

North Carolina Department of Transportation



ITP.00242 PDEA TRACKING UPGRADE

Training Materials & User Documentation

For the new PDEA ETRACS application

Version 1.0

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Project Information

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1.0	9/11/2015	Original version of the document
1.1	12/7/2015	Completed documentation of V1 functionality

Outstanding Items

This is an initial – and partial – first draft. The document will be completed iteratively, as is the ETRACS application, over the course of the project.

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1 Introduction

The goal of the ETRACS application is to provide a single application for both internal and external users to request work from the HES and NES groups, as well as provide work-request-tracking capability to the PDEA GIS analyst. This will facilitate communications, save time, and save cost for PDEA.

ETRACS will track work to completion. Communications and information-sharing between the groups will be facilitated by auto-generated notifications, regular status reminders, and reports.

User roles will be augmented to provide robust user access and streamline the workflow. This includes the addition of an executive management role to view status information.

New interfaces between the ETRACS application and STaRS will provide automatic data population for standard EIR requests and allow milestone completion updates from the application back to STaRS. Data-sharing among ETRACS, STaRS, BSIP and other relevant systems provides access to the most relevant and up-to-date information.

The use of a mobile platform will provide access to data and allow real-time data entry and reporting during field studies and meetings for engineers/consultants in the field.

2 Before You Begin

The material in this section is intended to provide a brief overview of the basic ETRACS functionality, as well as provide some useful tips to help you navigate through the application. The functions that you will use in ETRACS will be covered in later sections. For now, just get accustomed to the “look and feel” of the application so that you will be comfortable using it.

2.1 Understand User Roles

All user roles will be defined in the existing DOT WebRoles application, and system access will be provided based on the user role. Users can have multiple roles. Following is a brief introduction to user roles. More detail is available in the technical documentation.

Role	Functions
Internal Requestor (Project Planning Engineer)	Creates requests Manages work requested: <ul style="list-style-type: none">- Responds to due date updates- Updates requests For work done on their behalf by external consultants: <ul style="list-style-type: none">- Reviews requests- Submits request- Adds documents and files Generates status reports for their requests, including on-behalf
External Requestor	Creates requests on behalf of an Internal Requestor Manages work requested: <ul style="list-style-type: none">- Responds to due date updates- Updates requests Sends documents and files to Internal Requestor Generates status reports for their requests

Internal Specialist	Receives assigned requests Manages work requested: <ul style="list-style-type: none"> - Updates requests - Completes work assigned - Responds to due date updates For work done on their behalf by external consultants: <ul style="list-style-type: none"> - Reviews requests - Submits request - Adds documents and files Generates status and PDA reports for their requests, including on-behalf
External Specialist	Receives assigned requests Manages work requested: <ul style="list-style-type: none"> - Updates requests - Completes work assigned - Responds to due date updates Sends documents and files to Internal Specialist Generates status reports for their requests
Supervisors	Manages requests for their groups: <ul style="list-style-type: none"> - Reviews requests - Assigns requests - Updates requests - Returns requests / proposes alternate due dates - Create requests for external requestors Generates status and PDA reports for their groups Transfers single requests
Group Lead / Team Lead	Assigns Unassigned Requests to Supervisors Returns requests to Requestor Generates status and PDA reports for requests in the section
Section Head	Generates status and PDA reports for requests in the section Receives reports: daily open tasks, work unopened for 10 days, and upcoming due dates
Administrator	Transfers single requests Manages user roles, modifies information for work request types, and other administrative tasks as needed

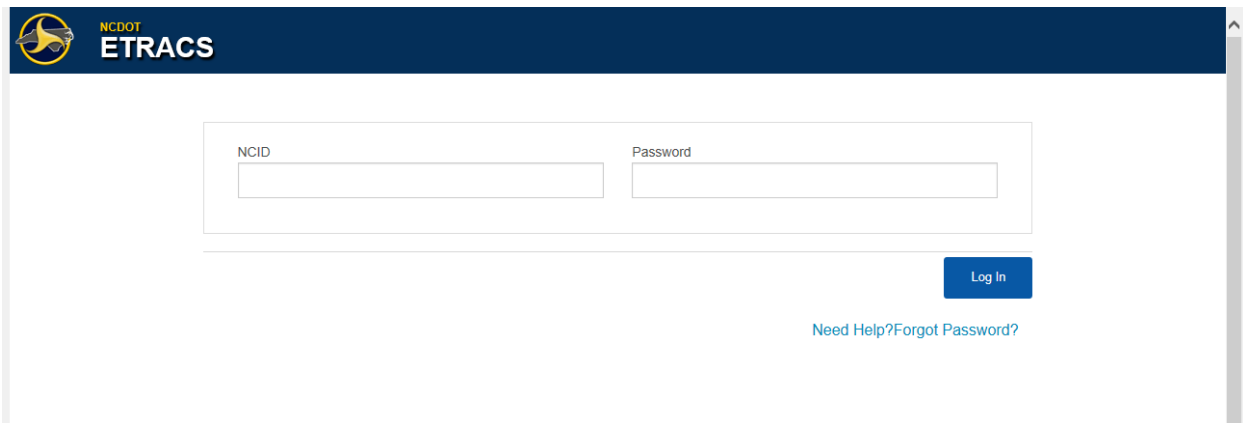
2.2 Logon to ETRACS

To logon to ETRACS:

1. Open a browser and navigate to the PDEA ETRACS training site:

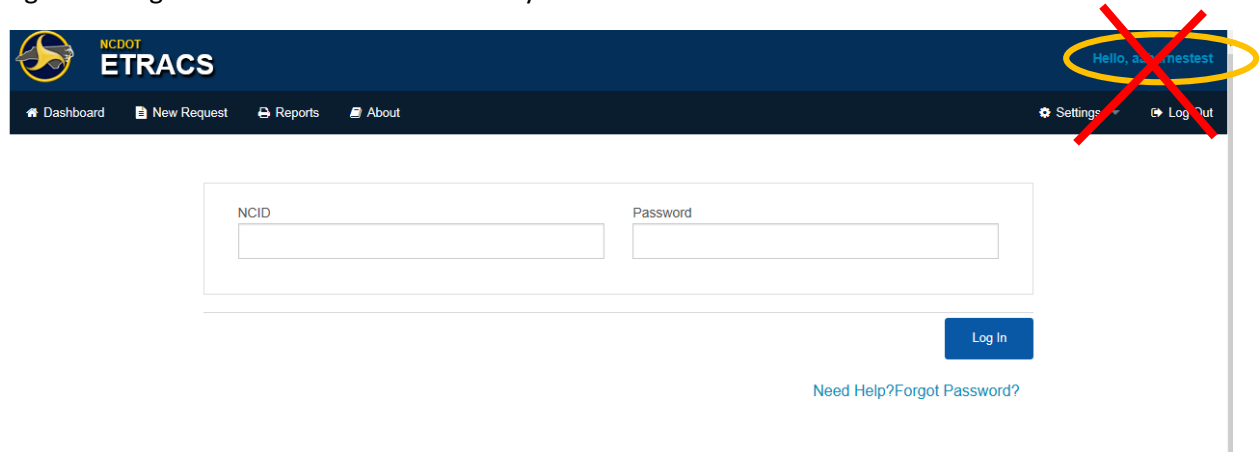
T BD – will furnish URL, along with all login information, when UAT starts.

The 'NC DOT ETRACS' logon page opens.



The screenshot shows the NC DOT ETRACS login page. At the top is a dark blue header with the NC DOT logo and the text "ETRACS". Below the header is a white login form with two input fields: "NCID" and "Password". To the right of the "Password" field is a blue "Log In" button. Below the "Log In" button is a link that says "Need Help?Forgot Password?".

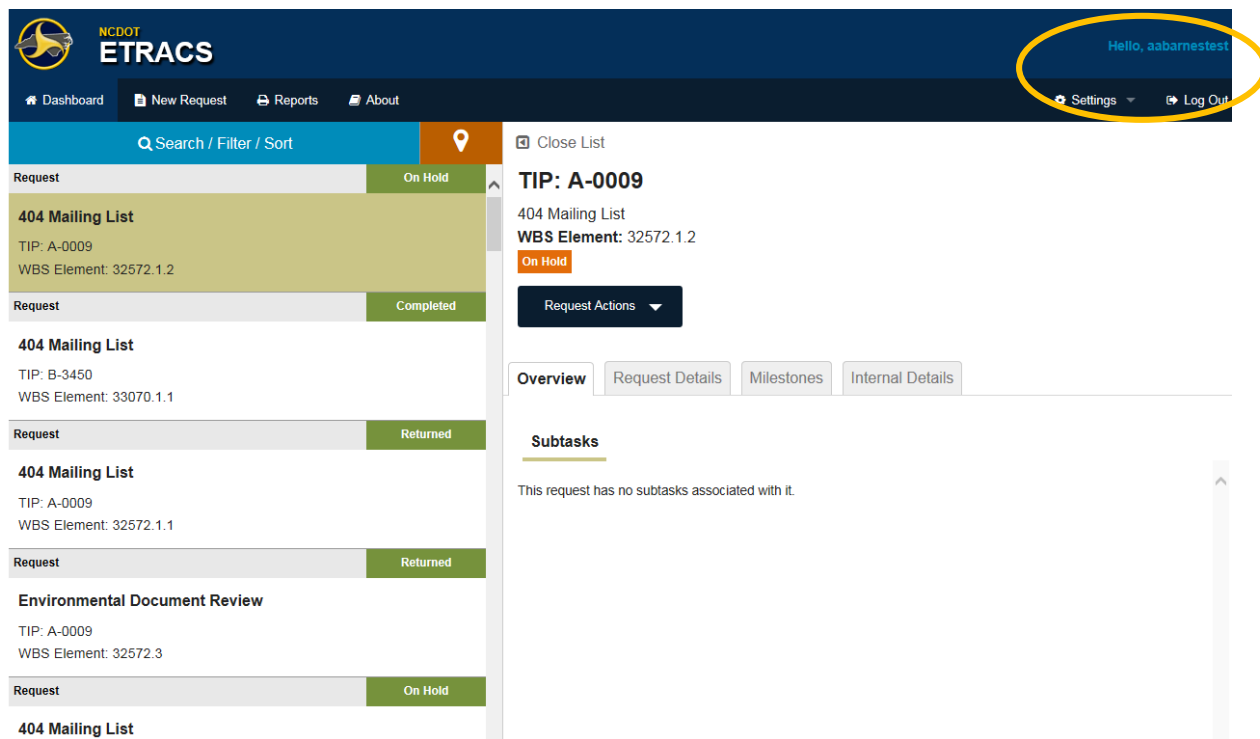
NOTE: If you ever see a logon screen with your name already shown as logged in, please log out & then log back in again. This is an indication of a system error.



The screenshot shows the NC DOT ETRACS dashboard. At the top is a dark blue header with the NC DOT logo and the text "ETRACS". Below the header is a dark blue navigation bar with links: "Dashboard", "New Request", "Reports", "About", "Settings", and "Log Out". In the top right corner of the dashboard, there is a yellow oval containing the text "Hello, a...nctest". A large red "X" is drawn over this oval. Below the navigation bar is a white login form with two input fields: "NCID" and "Password". To the right of the "Password" field is a blue "Log In" button. Below the "Log In" button is a link that says "Need Help?Forgot Password?".

2. Log on with your valid NCID credentials: provide your NCID and Password and click the Log In button.

When you have logged in successfully: ETRACS will acknowledge you by username & you will see your Dashboard. This view will show you all the work you've been assigned, as well as work that you have requested, or work that you supervise.



2.3 View Dashboard: Search / Filter / Sort

The Dashboard is your primary landing spot in ETRACS. Familiarizing yourself with the dashboard will help you get up-to-speed quickly.

Depending upon your job function and the level of your activity, you could easily have 50-60 things in your dashboard. Therefore, you need a way to search and filter the list. You can also see that the list, by default, contains only Requests and does not show either Projects or Sub-Tasks.

1. Click the Search / Filter / Sort button.

The screenshot shows the ETRACS web application interface. The top navigation bar includes the NCDOT logo, the title 'ETRACS', and a user greeting 'Hello, aabarnestest'. Below the navigation bar, there are links for 'Dashboard', 'New Request', 'Reports', and 'About'. A 'Search / Filter / Sort' button is highlighted with a yellow circle. To the right of this button is a 'Close List' button. The main content area displays a list of requests on the left and details for a selected request on the right. The selected request is 'TIP: A-0009' with 'WBS Element: 32572.1.2' and status 'On Hold'. The details panel includes tabs for 'Overview', 'Request Details', 'Milestones', and 'Internal Details', and a 'Subtasks' section indicating that no subtasks are associated with the request.

Request List:

Request	Status
404 Mailing List TIP: A-0009 WBS Element: 32572.1.2	On Hold
404 Mailing List TIP: B-3450 WBS Element: 33070.1.1	Completed
404 Mailing List TIP: A-0009 WBS Element: 32572.1.1	Returned
Environmental Document Review TIP: A-0009 WBS Element: 32572.3	Returned
404 Mailing List	On Hold

Request Details:

TIP: A-0009
404 Mailing List
WBS Element: 32572.1.2
On Hold

Request Actions ▼

Overview | Request Details | Milestones | Internal Details

Subtasks

This request has no subtasks associated with it.

The menu appears.

The screenshot displays the ETRACS application interface. At the top, the header includes the NCDOT logo, the text "ETRACS", and a user greeting "Hello, aabarnestest". Below the header is a navigation bar with links for "Dashboard", "New Request", "Reports", and "About", along with "Settings" and "Log Out" options.

A search filter menu is open, featuring a search bar and a "Close" button. The menu is organized into sections with various filters:

- Show Only:** Radio buttons for "My work", "Projects", "Requests" (selected), and "Sub-Tasks".
- Status:** A dropdown menu labeled "Select Some Options" and a checkbox for "Show items where compliance is not complete".
- Let Date:** Two date input fields in "mm/dd/yyyy" format.
- Section:** A dropdown menu labeled "Select Some Options".
- Project Type:** A dropdown menu labeled "Select Some Options".
- Region:** A dropdown menu labeled "Select Some Options".
- County:** A dropdown menu labeled "Select Some Options".
- Name:** A dropdown menu labeled "Select Some Options".
- Group:** A dropdown menu labeled "Select Some Options".
- Order by:** A dropdown menu currently showing "Date Due - Asc.".
- Division:** A dropdown menu labeled "Select Some Options".

A blue "Go" button is located at the bottom of the filter menu.

Below the filter menu, the interface shows a status bar with "Request" and "In Progress" indicators. A section titled "404 Mailing List" is visible, followed by "TIP: B-3450" and "WRS Element: 33070 1 1".

2. Select the parameters you need in order to conform the dashboard to the view you want. For example, if you are actively working on requests, start with showing My work, Requests, Order by: Date Created - Desc (descending). You can also filter by Status to focus on particular groups of requests, such as In Draft, Pending Review, etc.

The screenshot displays the ETRACS dashboard interface. At the top, the NCDOT logo and 'ETRACS' text are visible, along with a user greeting 'Hello, aabarnestest'. The navigation bar includes links for Dashboard, New Request, Reports, and About, as well as Settings and Log Out options.

The main filter panel on the left contains several sections:

- Show Only:** This section is circled in yellow. It includes checkboxes for 'My work' (checked), 'Projects', 'Requests' (checked), and 'Sub-Tasks'.
- Status:** A dropdown menu labeled 'Select Some Options' and a checkbox for 'Show items where compliance is not complete'.
- Let Date:** Two date input fields labeled 'mm/dd/yyyy' separated by a minus sign.
- Section:** A dropdown menu labeled 'Select Some Options'.
- Project Type:** A dropdown menu labeled 'Select Some Options'.
- Region:** A dropdown menu labeled 'Select Some Options'.
- County:** A dropdown menu labeled 'Select Some Options'.
- Name:** A dropdown menu labeled 'Select Some Options'.
- Group:** A dropdown menu labeled 'Select Some Options'.
- Order by:** This dropdown menu is circled in yellow and shows 'Date Created - Desc.' with a clear button (X).
- Division:** A dropdown menu labeled 'Select Some Options'.

A blue 'Go' button is located at the bottom of the filter panel.

Below the filter panel, the dashboard shows a summary for 'Request' with a status of 'In Progress'. It lists '404 Mailing List' and provides additional details: 'TIP: B-3450' and 'WRS Element: 33070 1 1'.

3. Click the Go button to re-load the dashboard.

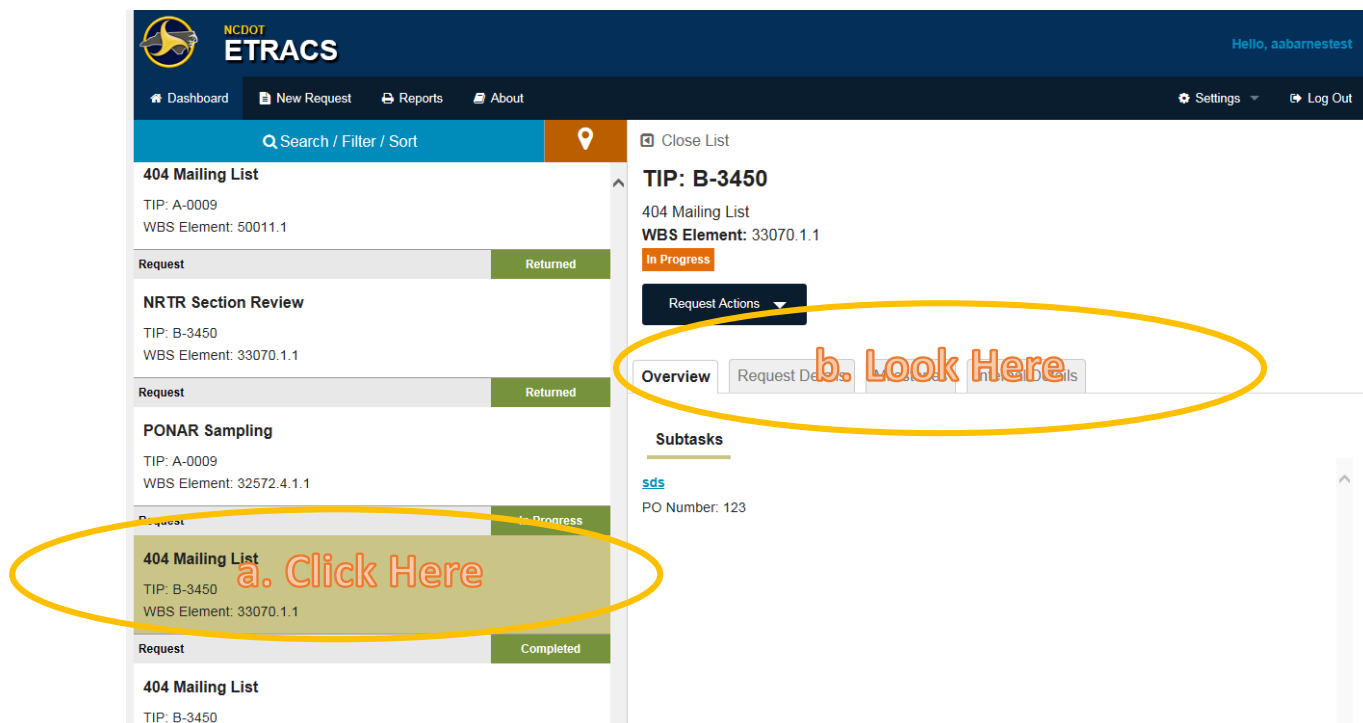
The screenshot shows the NCDOT ETRACS dashboard. At the top, there is a navigation bar with the NCDOT logo, the text "NCDOT ETRACS", and a user greeting "Hello, aabarnestest". Below the navigation bar, there are tabs for "Dashboard", "New Request", "Reports", and "About". On the right side of the navigation bar, there are links for "Settings" and "Log Out".

The main content area features a search interface. It includes a "Search..." input field, a "Keyword" dropdown menu, and a "Close" button. Below these, there are filter sections:

- Show Only:** ☒ My work ☐ Projects ☒ Requests ☐ Sub-Tasks
- Status:** ☐ Show items where compliance is not complete
- Let Date:** -
- Section:**
- Project Type:**
- Region:**
- County:**
- Name:**
- Group:**
- Order by:**
- Division:**

At the bottom of the search interface, there is a blue button labeled "Go" with a magnifying glass icon, which is circled in yellow. Below the search interface, there is a section for "Request" with a status of "In Progress". Below that, there is a section for "404 Mailing List" with a status of "In Progress".

4. When you've filtered the list down to find the items you need, click on an item on the left-hand side to load it in the detail view on the right-hand side of your screen.



2.4 Basic Navigation Tips

This section of this document will provide some basic navigation tips intended to quickly acquaint you with the ETRACS “rules of the road.”

2.4.1 Screen Layout, Tabs & Action Menus

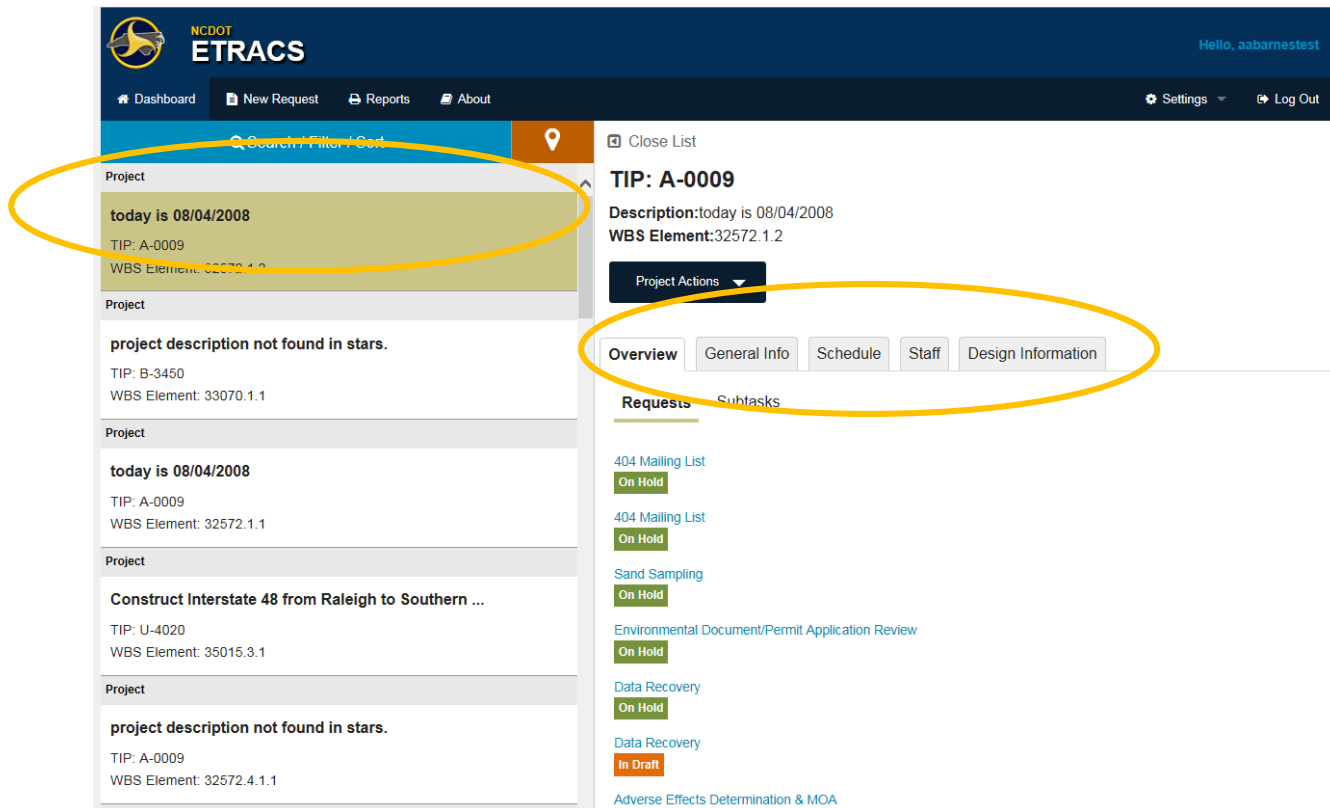
As shown in Section 2.3 View Dashboard, ETRACS generally flows from left-to-right.

There are a lot of different pieces of information to view and/or update for projects and requests, so you will notice a pattern of **tabs** in the edit windows. You can navigate through each tab to update the information in that tab. We suggest that you get into the habit of navigating through the tabs left-to-right to ensure that you are seeing and/or updating all of the information.

2.4.1.1 Project Tabs

With a project highlighted on the left-hand side, you will see tabs containing basic project information on the right-hand side.

NOTE: to see the project tabs, you must have “projects” in your dashboard view. See Section 2.3 “View Dashboard: Search / Filter / Sort.”



NOTE: Additional project information will be coming into ETRACS when ECAP is implemented. This information, which will be received by the various NES groups who are working requests, is still being defined by both the NES groups and by ECAP.

UNDER CONSTRUCTION

2.4.1.2 Project Actions

With a project highlighted on the left-hand side, click on the Project Actions dropdown menu to access the various basic actions that you can take at the project level. The actions available to you are dependent upon your role. These functions will be explained below. For now, just acquaint yourself with highlighting the project and familiarizing yourself with the Project Actions menu.

NOTE: Additional project information will be coming into ETRACS when ECAP is implemented. This information, which will be received by the various NES groups who are working requests, is still being defined by both the NES groups and by ECAP.

UNDER CONSTRUCTION

Project

today is 08/04/2008
TIP: A-0009
WBS Element: 32572.2.1.1

Request In Progress

Mitigation Reports & Documentation, Landscape Plans
TIP: A-0009
WBS Element: 32572.2.1.1

TIP: A-0009
Description: today is 08/04/2008
WBS Element: 32572.2.1.1

Project Actions

- Update Project
- Put Project on Hold
- New Request
- View Map
- Log

Documents

- Consultant Workday Estimate
In Draft
- Environmental Document Review
In Draft
- Location & Design Approval Letter (LADA)
In Draft
- Other Document Review
In Draft
- Landowner Notification
In Draft
- Construction Consultation
In Draft
- NRTR Review
In Draft
- Right of Way Consultation

2.4.1.3 Request Tabs

With a request highlighted on the left-hand side, you will see tabs containing request information on the right-hand side.

The screenshot displays the ETRACS web application interface. On the left, a list of requests is shown, including '404 Mailing List' and 'Environmental Document Review'. The 'Environmental Document Review' request is highlighted with a yellow circle. On the right, the details for the selected request are shown, including the title 'TIP: A-0009', the description 'Environmental Document Review', and the WBS Element '32572.3'. The 'Request Actions' dropdown menu is highlighted with a yellow circle. Below the dropdown, there are tabs for 'Overview', 'Request Details', 'Milestones', and 'Internal Details'. The 'Overview' tab is currently selected. Below the tabs, there is a section for 'Subtasks' which states 'This request has no subtasks associated with it.'

2.4.1.4 Request Actions

With a request highlighted on the left-hand side, click on the Request Actions dropdown menu to access the various actions that you can take for a request. The actions available to you are dependent upon

your role. These functions will be explained below; for now, just acquaint yourself with highlighting the request and familiarizing yourself with the Request Actions menu.

The screenshot displays the ETRACS web application interface. The top navigation bar includes the NCDOT logo, the ETRACS title, and a user greeting "Hello, aabarnestest". Below this, a secondary navigation bar contains links for "Dashboard", "New Request", "Reports", and "About". A search bar with the placeholder "Search / Filter / Sort" and a "Close List" button are also present.

The main content area shows a list of requests. The first request is "404 Mailing List" with TIP: A-0009 and WBS Element: 32572.1.2, status "On Hold". The second request is "404 Mailing List" with TIP: B-3450 and WBS Element: 33070.1.1, status "Completed". The third request is "404 Mailing List" with TIP: A-0009 and WBS Element: 32572.1.1, status "Returned". The fourth request is "404 Mailing List" with TIP: A-0009 and WBS Element: 32572.1.1, status "Returned". The fifth request is "Environmental Document Review" with TIP: A-0009 and WBS Element: 32572.3. The sixth request is "404 Mailing List" with TIP: A-0009 and WBS Element: 32572.1.2, status "On Hold". The seventh request is "404 Mailing List" with TIP: B-3450 and WBS Element: 33070.1.1, status "In Progress".

A yellow circle highlights the "Request Actions" menu for the "On Hold" request. The menu options are: "Return", "Update", "Log", "Transfer", "Assign", "View Map", "View Project Info", and "Delete Request".

Another yellow circle highlights the "On Hold" status of the "404 Mailing List" request with TIP: A-0009 and WBS Element: 32572.1.2.

2.4.2 Buttons

There will be Save and Cancel buttons on almost screens.

- SAVE (SAVE ALL) will save your information and will not generate notifications
- CANCEL (also X, depending upon context) will allow you to remove entered information in a text box, back out of a function, or close a window or popup, depending on context.

The screenshot displays the 'Update Request' window with the 'Internal Details' tab selected. The form contains several sections for data entry:

- Internal Due Date:** A single text input field.
- HPO Details:** A section with four text input fields: 'Draft Report Received Date', 'Revised Draft Received Date', 'HPO Concurrence Received Date', and 'Report Transmitted to HPO Date'. Below these fields is a 'View all comments' link with a dropdown arrow.
- Agency Details:** A section with three text input fields: 'Name of Agency', 'Received From Date', and 'Delivered To Date'. Below these fields is a 'View all comments' link with a dropdown arrow.
- Internal Notes:** A section with a 'View all Internal Notes' link and a dropdown arrow.

At the bottom of the form, there are two buttons: a green 'Save' button and a white 'Cancel' button with a red 'X' icon. These buttons are circled in yellow.

Many screens also have a Submit button, depending upon the function you are performing. SUBMIT (SUBMIT ALL) will tell ETRACS to validate all of the required information and will either:

- a) Give you an error message and take you to the place where you need to correct your data
- b) Give you a success message/icon and take you to the next step in the process.

The screenshot displays the ETRACS web application interface. The top navigation bar includes the ETRACS logo, user name 'Hello, aabarnestest', and links for Dashboard, New Request, Reports, About, Settings, and Log Out. The main content area is titled 'Create Request'. On the left, there are two sections: 'HES Section' and 'NES Section'. The 'HES Section' has a dropdown for 'Select one or more groups from HES and one group from NES.' with options: Historic Architecture, Archaeology, and Environmental Coordination & Permitting. Below this is a dropdown for 'Select your request types from the groups below.' with options: Adverse Effects Determination & MOA, Cultural Resources PA (CE & Minimum Criteria Projects), Comprehensive Survey & Site Evaluation, and Data Recovery. The 'NES Section' has a dropdown for 'Select one or more groups from NES' with options: NRTR and NRTR Review. On the right, the 'Requests' section shows a list of requests. The first request is 'Historic Architecture - Adverse Effects Determination & MOA'. The 'Submit this Request' button in the request header is circled in yellow. Below the request header, there are tabs for 'Request Details', 'Milestones', and 'Documents'. The 'Documents' tab is active, showing a 'Vicinity Map' and input fields for 'NCDOT Input Letters', 'Designated Lead Federal Agency', and 'Preliminary Design', each with a URL. There are also fields for 'Finding of Adverse Effects' and 'Comments on Finding'.

Many screens also have an Add and/or Remove function, depending upon what you are performing. The buttons allow you to add or remove an item on a screen/list.

The screenshot displays the 'Update Request' window with the 'Request Details' tab selected. The window contains two main sections: 'Comments on Mitigation Documents' and 'Common Documents'. Both sections have input fields for 'Document Name' and 'Add document path', and a blue minus sign button to the right of the path field. In the 'Comments on Mitigation Documents' section, the 'Add document path' field contains the text 'C:/Some/Path'. Below the input fields in each section is a blue button with a plus icon and the text 'Add Additional Deliverables' (in the first section) or 'Add Additional Documents' (in the second section). A yellow circle highlights the 'Add Additional Deliverables' button in the first section, and another yellow circle highlights the minus sign button to the right of the 'Add document path' field in the same section. The 'Common Documents' section has a similar layout with a minus sign button to the right of its 'Add document path' field. The 'Documents' section at the bottom is partially visible.

2.5 Scroll Bars

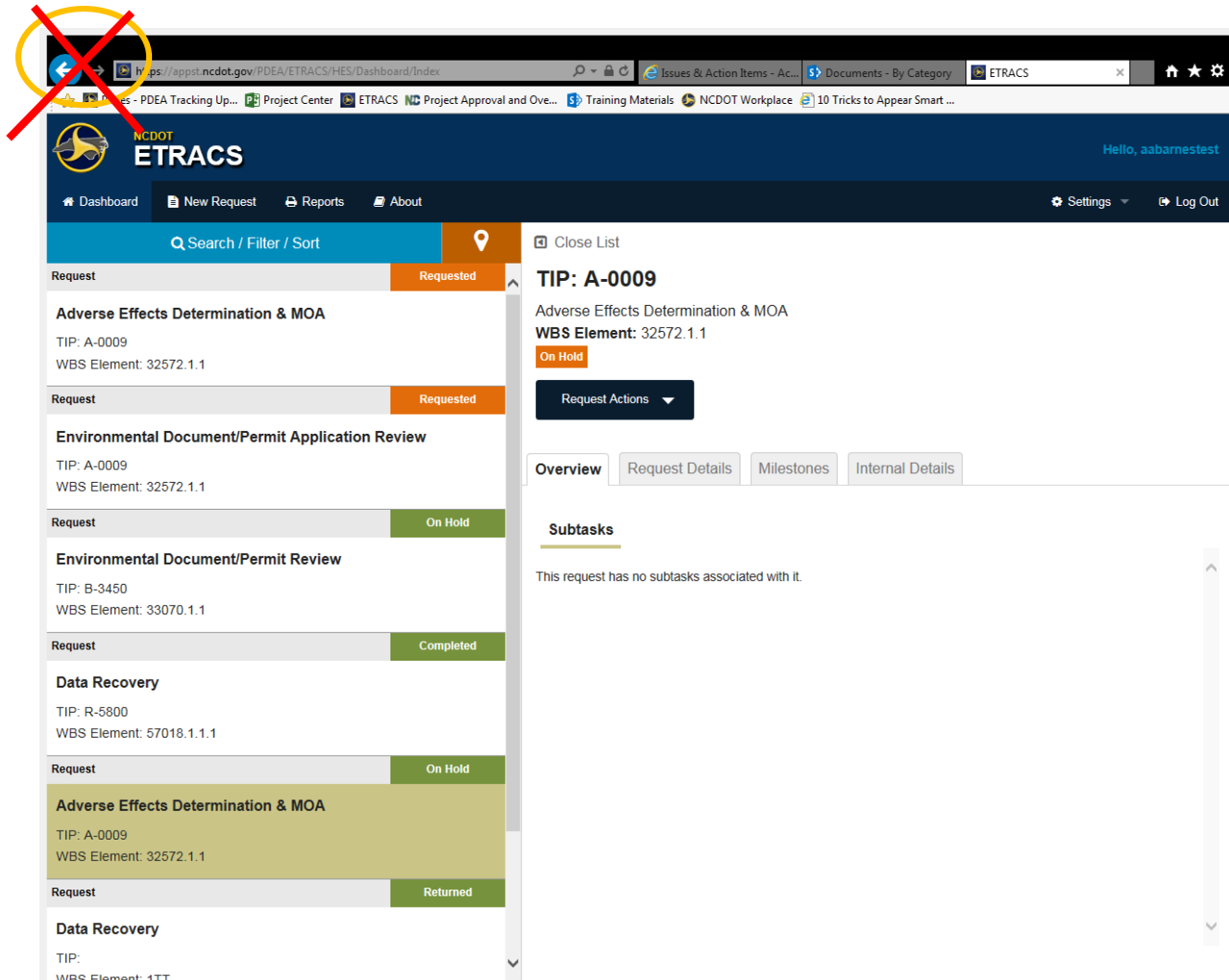
Many screens are quite large, requiring you to use the scroll bar to ensure that you see / enter all the information.

The screenshot shows the NCDOT ETRACS 'Create Request' interface. The top navigation bar includes links for Dashboard, New Request, Reports, and About, along with user settings and a Log Out button. The main content area is titled 'Create Request' and contains several sections:

- Select one or more groups from HES and one group from NES.** This section includes tags for 'Historic Architecture', 'Archaeology', and 'Environmental Coordination & Permitting'.
- Select your request types from the groups below.** This section is divided into 'HES Section' and 'NES Section'. The 'HES Section' includes tags for 'Adverse Effects Determination & MOA', 'Cultural Resources PA (CE & Minimum Criteria Projects)', 'Comprehensive Survey & Site Evaluation', and 'Data Recovery'. The 'NES Section' includes tags for 'NRTR' and 'NRTR Review'.
- Requests** section: This section displays a list of requests, with the first one being 'Historic Architecture - Adverse Effects Determination & MOA'. Below the request title, there are tabs for 'Request Details', 'Milestones', and 'Documents'. The 'Documents' tab is currently selected, showing a 'Vicinity Map' and several input fields for 'NCDOT Input Letters', 'Designated Lead Federal Agency', 'Preliminary Design', and 'Finding of Adverse Effects'. A yellow oval highlights the vertical scroll bar on the right side of the form, indicating that the content is scrollable.

2.6 Cautions about Browsers

As you use ETRACS to create and update requests, **please be cautious** about using the browser BACK button. In some cases, this will corrupt the request or project that you are working on. Instead, get into the habit of using the buttons, Action menus, and other functions on the screen itself to navigate.



2.7 User Preferences

UNDER CONSTRUCTION

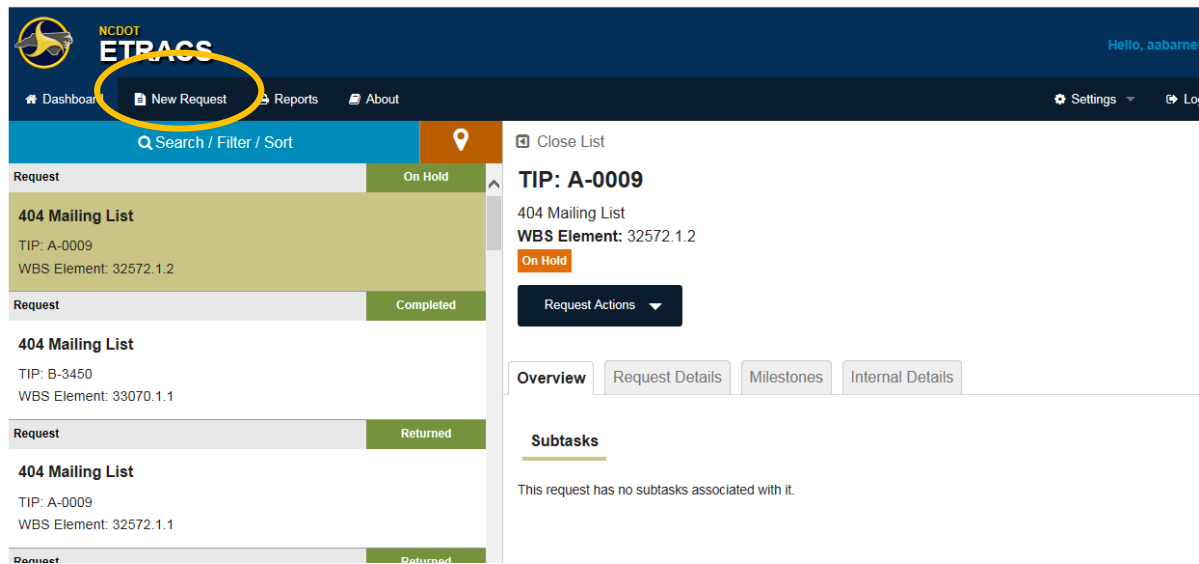
3 Request Functions – For the Requestor

The first step in using ETRACS is to create a request. This is where the process starts!

3.1 Create Request – Step 1 Search and Retrieve Project Information

If you are an internal or external requestor, or a supervisor, you can create requests.

1. Click 'New Request' from the application top navigation bar.



The Create Request screen appears:

The screenshot shows the 'Create Request' screen in the ETRACS application. The header is the same as the previous screenshot. Below the header, the page title is 'Create Request'. The form is divided into two main sections. The left section is titled 'Select your project type:' and contains two radio buttons: 'TIP Project' (selected) and 'Non-TIP Project'. Below these are two input fields: 'Enter TIP #' and 'WBS Element(s)'. A blue 'Verify' button is located below the input fields. The right section is titled 'Project Description:' and contains a grey 'Continue' button. At the bottom of the form, there is a question 'Is this a bridge project?' with two radio buttons: 'Yes' and 'No'.

Now you start by identifying the project that you're going to create requests for.

NOTE: Additional project information will be coming into ETRACS when ECAP is implemented. This information, which will be received by the various NES groups who are working requests, is still being defined by both the NES groups and by ECAP.

UNDER CONSTRUCTION

2. Select either the:
 - a. TIP Project radio button, or
 - b. Non-TIP Project radio button.

ETRACS Hello, aabarnestest

Dashboard New Request Reports About Settings Log Out

Create Request

Select your project type:

☒ TIP Project

☐ Non-TIP Project

Enter TIP #

WBS Element(s)

Verify

Project Description:

Continue

Is this a bridge project?

☐ Yes ☐ No

3. Enter either the:
 - a. TIP#, or
 - b. Non-TIP WBS number from SAP.

NOTE: You should always know whether your project is TIP or non-TIP. You should also always be working with a TIP#/WBS# that you know exists as an active project in SAP\STaRS in the database that ETRACS is connected to.

ETRACS Hello, aabarnestest

Dashboard New Request Reports About Settings Log Out

Create Request

Select your project type:

☒ TIP Project

☐ Non-TIP Project

Enter TIP #

WBS Element(s)

Verify

Project Description:

Continue

Is this a bridge project?

☐ Yes ☐ No

ETRACS will take a few seconds to load data from STaRS and will display the Project Description. Check to be sure you have the correct project loaded.

ETRACS Hello, aabarnestest

Dashboard New Request Reports About Settings Log Out

Create Request

Select your project type:

☒ TIP Project
☐ Non-TIP Project

Enter TIP #
I-5110

WBS Element(s)

Verify

Is this a bridge project?
☐ Yes ☐ No

Project Description:
I-73 FROM NC 68 TO GREENSBORO WESTERN LOOP. PROJECT COMBINED WITH R-2413A, R-2413B FOR LET DESIGN BUILD LET.
Continue

4. Click the Verify button.

ETRACS Hello, aabarnestest

Dashboard New Request Reports About Settings Log Out

Create Request

Select your project type:

☒ TIP Project
☐ Non-TIP Project

Enter TIP #
I-5110

WBS Element(s)

Verify

Is this a bridge project?
☐ Yes ☐ No

Project Description:
I-73 FROM NC 68 TO GREENSBORO WESTERN LOOP. PROJECT COMBINED WITH R-2413A, R-2413B FOR LET DESIGN BUILD LET.
Continue

5. If you have selected:

- TIP Project, you must now select the WBS number at the level where you want to create the request. Proceed to the next step.
- The WBS# for a non-TIP project, it will be already be displayed.

NOTE: project data is normally stored in SAP at the 3rd level. However, ETRACS will display all of the WBS levels that are in SAP and will allow you to create a request at any level of the WBS.

NOTE: SAP filters out all project/WBS numbers that have been completed and closed. Therefore, you will not see them in your search. Contact your supervisor if you believe that this will be a problem for your creating a request.



Create Request

Select your project type:

- ☒ TIP Project
☐ Non-TIP Project

Enter TIP #

I-5110

WBS Element(s)

42345
42345.1
42345.1.1
42345.2
42345.2.1
42345.2.FSU1
42345.3
42345.3.FS1
42345.3.2
42345.3.S3
42345.1.1.4

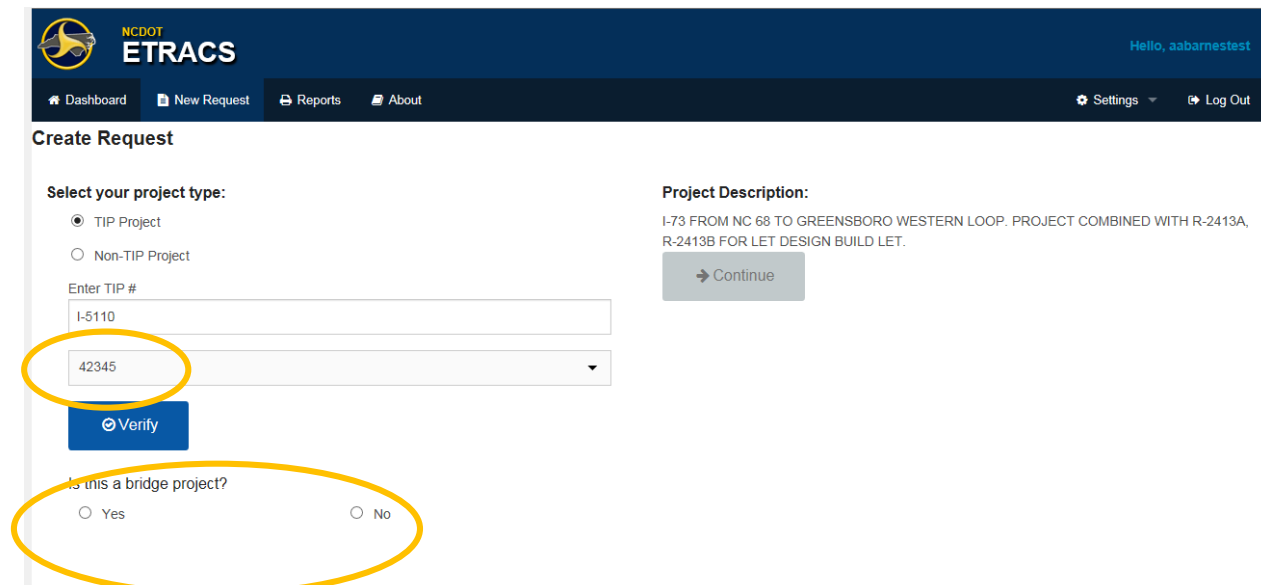
Project Description:

I-73 FROM NC 68 TO GREENSBORO WESTERN LOOP. PROJECT COMBINED WITH R-2413A, R-2413B FOR LET DESIGN BUILD LET.

Continue

6. Select the WBS number at the level where you want to create the request.

The system will now display the selected WBS level and the question “Is this a bridge project?” will be enabled.



7. Select either the Yes or No radio button. After selecting the appropriate radio button:
 - a. If this is a bridge project, proceed to Step 8 “Click on BRIDGE and select the bridge you want from the dropdown list.”
 - b. If this is not a bridge project, skip to Step 9 “Select the Continue button.”
8. Click on BRIDGE and select the bridge you want from the dropdown list.

ETRACS Hello, aabarnestest

Dashboard New Request Reports About Settings Log Out

Create Request

Select your project type:

☒ TIP Project
☐ Non-TIP Project

Enter TIP #
B-3450

33070.1.1

Verify

Is this a bridge project?

☒ Yes ☐ No

Bridge
074 0362
099 0209

Project Description:

This is a test

Continue

9. Select the Continue button.

ETRACS Hello, aabarnestest

Dashboard New Request Reports About Settings Log Out

Create Request

Select your project type:

☒ TIP Project
☐ Non-TIP Project

Enter TIP #
I-5110

42345

Verify

Is this a bridge project?

☐ Yes ☒ No

Project Description:

I-73 FROM NC 68 TO GREENSBORO WESTERN LOOP. PROJECT COMBINED WITH R-2413A, R-2413B FOR LET DESIGN BUILD LET.

Continue

The system will now display all of the Project Information from STaRs on the four tabs, as explained in the section, Project Information Tabs, below.

3.1.1 Project Information Tabs

Walkthrough the four project information tabs. The data pulled from STaRS/SAP will display on the tabs, and ETRACS allows you to update any information before creating your request. There is lots of information, so you will need to check all four tabs.

NOTE: all fields marked with a red asterisk (*****) are required. You will be prompted for the areas where there is missing information that will prevent your creating your request.

NOTE: Additional project information will be coming into ETRACS when ECAP is implemented. This information, which will be received by the various NES groups who are working requests, is still being defined by both the NES groups and by ECAP.

UNDER CONSTRUCTION

The following five tabs/functions are described below:

3.1.1.1 GENERAL INFO TAB

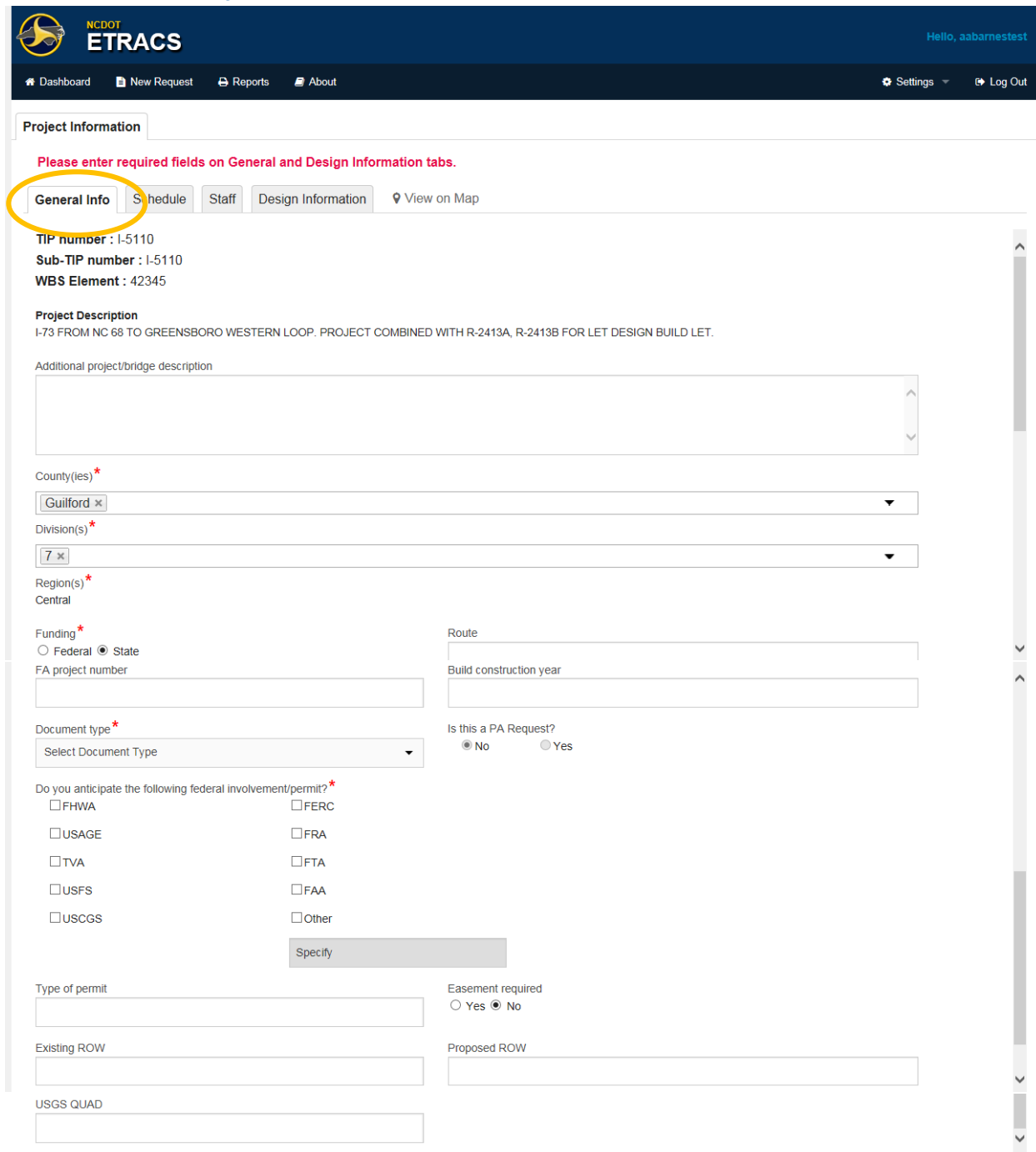
3.1.1.2 SCHEDULE TAB

3.1.1.3 STAFF TAB

3.1.1.4 DESIGN INFORMATION TAB

3.1.2 VIEW ON MAP

3.1.1.1 General Info Tab



The screenshot shows the ETRACS web application interface. At the top is a dark blue header with the NCDOT logo and the text "Hello, aabarnestest". Below the header is a navigation bar with links for Dashboard, New Request, Reports, and About. On the right of the navigation bar are links for Settings and Log Out. The main content area is titled "Project Information" and contains a red message: "Please enter required fields on General and Design Information tabs." Below this message are four tabs: "General Info", "Schedule", "Staff", and "Design Information". The "General Info" tab is selected and highlighted with a yellow circle. The "View on Map" link is also visible. The form fields under the "General Info" tab include: TIP number (I-5110), Sub-TIP number (I-5110), WBS Element (42345), Project Description (I-73 FROM NC 68 TO GREENSBORO WESTERN LOOP, PROJECT COMBINED WITH R-2413A, R-2413B FOR LET DESIGN BUILD LET.), Additional project/bridge description (text area), County(ies) (Guilford), Division(s) (7), Region(s) (Central), Funding (State selected), FA project number (text field), Route (text field), Build construction year (text field), Document type (Select Document Type dropdown), Is this a PA Request? (No selected), Do you anticipate the following federal involvement/permit? (checkboxes for FHWA, USAGE, TVA, USFS, USCGS, FERC, FRA, FTA, FAA, Other), Specify (text field), Type of permit (text field), Easement required (No selected), Existing ROW (text field), Proposed ROW (text field), and USGS QUAD (text field).

Project Information

Please enter required fields on General and Design Information tabs.

General Info | Schedule | Staff | Design Information | View on Map

TIP number : I-5110
Sub-TIP number : I-5110
WBS Element : 42345

Project Description
I-73 FROM NC 68 TO GREENSBORO WESTERN LOOP, PROJECT COMBINED WITH R-2413A, R-2413B FOR LET DESIGN BUILD LET.

Additional project/bridge description

County(ies) *
Guilford x

Division(s) *
7 x

Region(s) *
Central

Funding *
☐ Federal ☒ State

FA project number

Route

Build construction year

Document type *
Select Document Type

Is this a PA Request?
☒ No ☐ Yes

Do you anticipate the following federal involvement/permit? *

<input type="checkbox"/> FHWA	<input type="checkbox"/> FERC
<input type="checkbox"/> USAGE	<input type="checkbox"/> FRA
<input type="checkbox"/> TVA	<input type="checkbox"/> FTA
<input type="checkbox"/> USFS	<input type="checkbox"/> FAA
<input type="checkbox"/> USCGS	<input type="checkbox"/> Other

Specify

Type of permit

Easement required
☐ Yes ☒ No

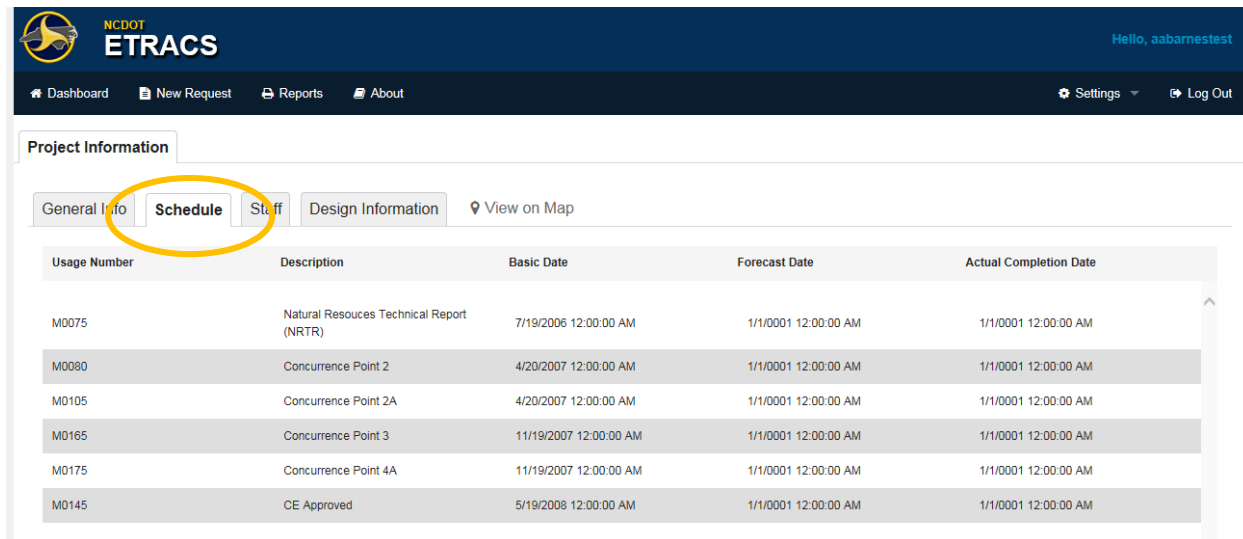
Existing ROW

Proposed ROW

USGS QUAD

10. Provide updates as needed. Information can be added to any editable field.

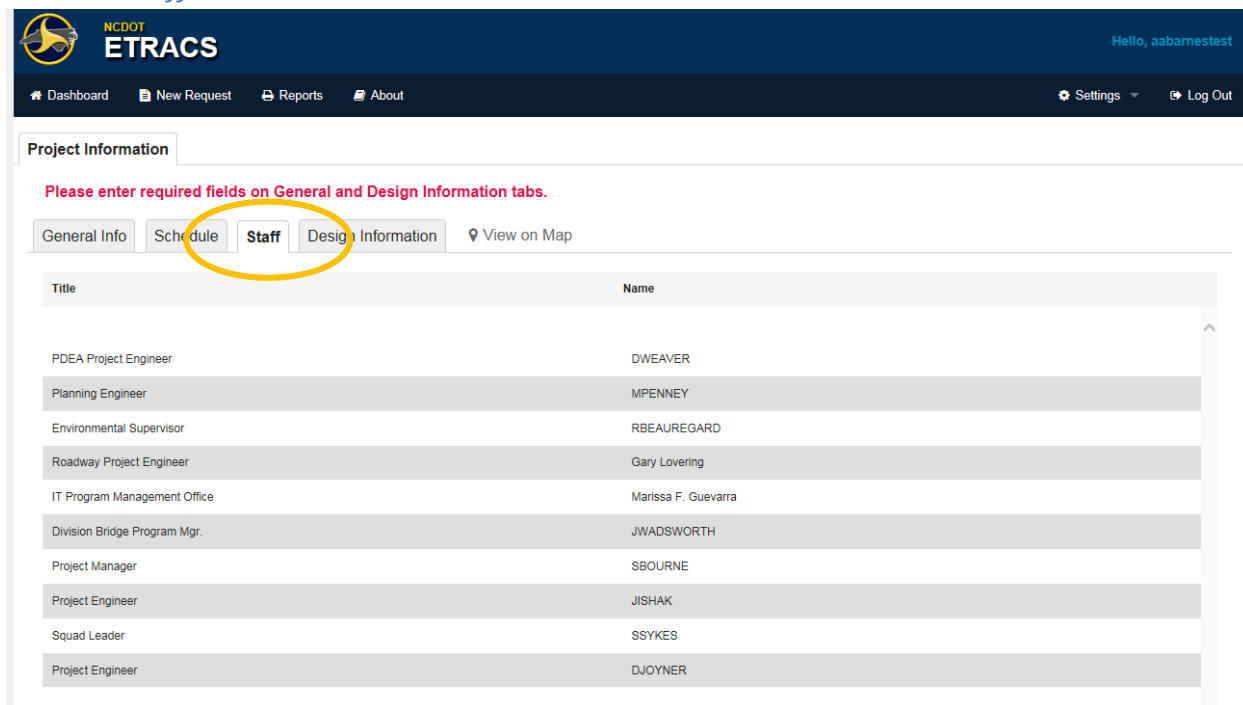
3.1.1.2 Schedule Tab



Usage Number	Description	Basic Date	Forecast Date	Actual Completion Date
M0075	Natural Resources Technical Report (NRTR)	7/19/2006 12:00:00 AM	1/1/0001 12:00:00 AM	1/1/0001 12:00:00 AM
M0080	Concurrence Point 2	4/20/2007 12:00:00 AM	1/1/0001 12:00:00 AM	1/1/0001 12:00:00 AM
M0105	Concurrence Point 2A	4/20/2007 12:00:00 AM	1/1/0001 12:00:00 AM	1/1/0001 12:00:00 AM
M0165	Concurrence Point 3	11/19/2007 12:00:00 AM	1/1/0001 12:00:00 AM	1/1/0001 12:00:00 AM
M0175	Concurrence Point 4A	11/19/2007 12:00:00 AM	1/1/0001 12:00:00 AM	1/1/0001 12:00:00 AM
M0145	CE Approved	5/19/2008 12:00:00 AM	1/1/0001 12:00:00 AM	1/1/0001 12:00:00 AM

11. Check the information that has come from STaRS/SAP. You may not update. Check the milestone list to ensure you are at the proper WBS level.

3.1.1.3 Staff Tab



Please enter required fields on General and Design Information tabs.

Title	Name
PDEA Project Engineer	DWEAVER
Planning Engineer	MPENNEY
Environmental Supervisor	RBEAUREGARD
Roadway Project Engineer	Gary Lovering
IT Program Management Office	Marissa F. Guevarra
Division Bridge Program Mgr.	JWADSWORTH
Project Manager	SBOURNE
Project Engineer	JISHAK
Squad Leader	SSYKES
Project Engineer	DJOYNER

12. Check the information that has come from STaRS/SAP. You may not update.

3.1.1.4 Design Information Tab

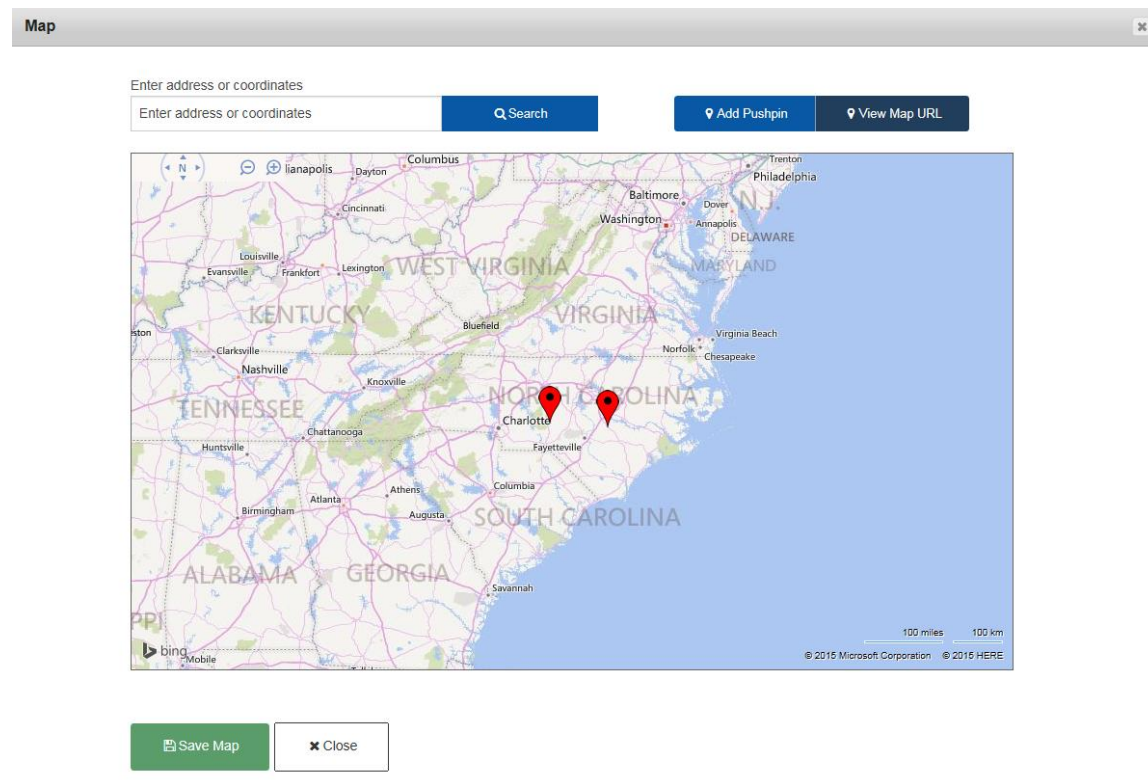
The screenshot shows the ETRACS application interface. The top navigation bar includes the NCDOT logo, the text "ETRACS", and a user greeting "Hello, aabarnestest". Below this is a menu with "Dashboard", "New Request", "Reports", and "About". On the right of the menu are "Settings" and "Log Out". The main content area is titled "Project Information" and contains four sub-tabs: "General Info", "Schedule", "Staff", and "Design Information". The "Design Information" tab is selected and highlighted with a yellow circle. To the right of the tabs is a "View on Map" link. The form fields under the "Design Information" tab are: "Project length(Miles)*" with a value of "22.20", "Number of structures to replace" (empty), "Existing cross section*" with a value of "ghgfh", "Proposed cross section*" with a value of "hgjhgj", and "Additional design information" (empty). Each text field has a vertical scrollbar on its right side.

13. Provide updates as needed. Information can be added to any editable field.

3.1.2 View on Map

After you are satisfied with the information on the tabs, click on the View on Map function.

This screenshot is identical to the one above, showing the ETRACS application interface with the "Design Information" tab selected. The key difference is that the "View on Map" link, located to the right of the sub-tabs, is now highlighted with a yellow circle, indicating the next step in the process.



14. Provide updates as needed.

15. Add **all the pins you want**, then click the Save Map button.

NOTE: Project pins are red. Request pins are yellow.

3.1.2.1 Basic Project Information Complete

NOTE: Additional project information will be coming into ETRACS when ECAP is implemented. This information, which will be received by the various NES groups who are working requests, is still being defined by both the NES groups and by ECAP.

UNDER CONSTRUCTION

When all required information has been entered – that is, all fields marked with a red asterisk * – and you are satisfied with all of the project information on all four tabs and the map:

16. Click the Create Request button at the bottom of the Design Information tab.

Dashboard New Request Reports About Settings Log Out

Project Information

General Info Schedule Staff Design Information View on Map

Project length(Miles)* 22.20

Number of structures to replace

Existing cross section* ghgfh

Proposed cross section* hgjhj

Additional design information

Create Request >

NOTE: The system has now saved your project information.

An empty Create Request screen appears.

NCDOT ETRACS Hello, aabarnestest

Dashboard New Request Reports About Settings Log Out

Create Request

+ Add Request Type Save All Submit All

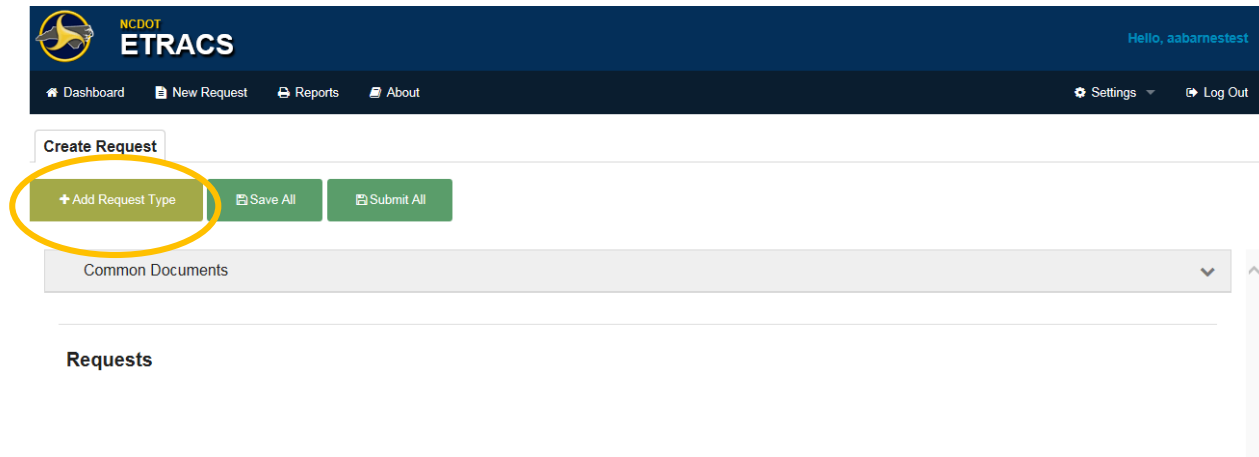
Common Documents

Requests

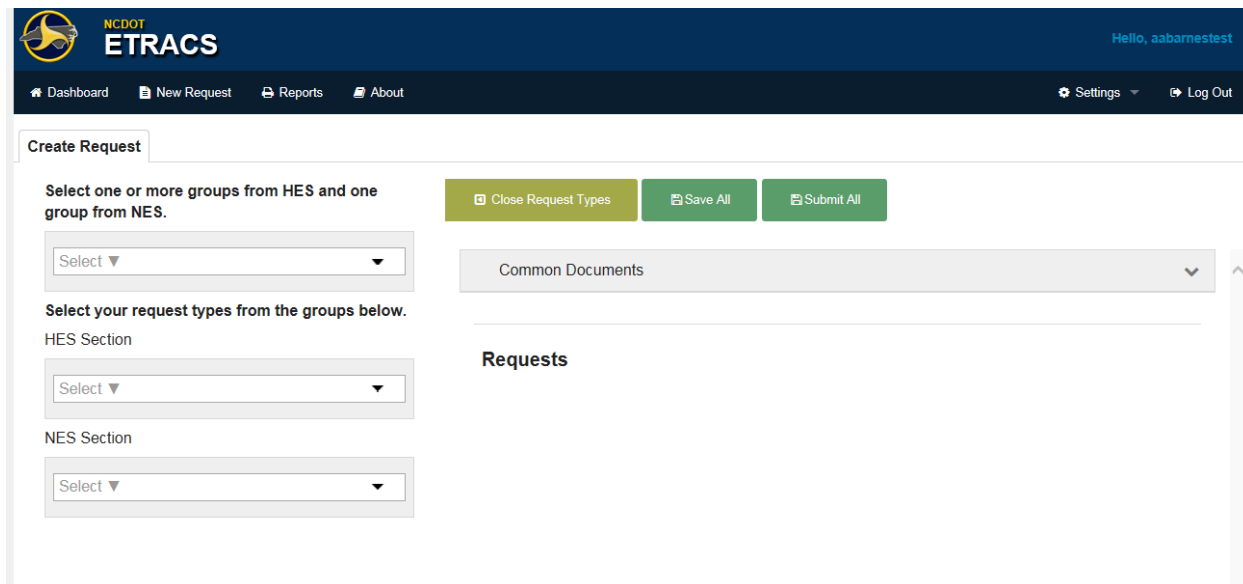
3.2 Create Request – Step 2 Create Your List of Requests

Starting on the empty Create Request screen:

1. Click the + Add Request Type button.



The Request Selection panel appears on the left-hand side.



2. In the first dropdowns on the left-hand selection panel, select as many HES and NES groups as you need.

The screenshot shows the 'Create Request' form in the ETRACS system. The top navigation bar includes the NCDOT logo, 'ETRACS' title, and user 'Hello, aabarnestest'. The main menu has 'Dashboard', 'New Request', 'Reports', and 'About'. The 'Create Request' section has a title 'Create Request' and a subtitle 'Select one or more groups from HES and one group from NES.' A yellow circle highlights the first dropdown menu, which contains 'Historic Architecture', 'Archaeology', and 'Environmental Coordination & Permitting'. Below this, there are two more dropdowns: 'HES Section' and 'NES Section', both with 'Select' as the current value. To the right of the dropdowns are three buttons: 'Close Request Types', 'Save All', and 'Submit All'. Below the buttons is a 'Common Documents' dropdown and a 'Requests' section.

3. On the second and third dropdowns on the left-hand selection panel, select the appropriate request type(s) from the groups that are enabled in each section (HES and NES).

The screenshot shows the 'Create Request' form in the ETRACS system. The top navigation bar includes the NCDOT logo, 'ETRACS' title, and user 'Hello, aabarnestest'. The main menu has 'Dashboard', 'New Request', 'Reports', and 'About'. The 'Create Request' section has a title 'Create Request' and a subtitle 'Select one or more groups from HES and one group from NES.' A yellow circle highlights the 'HES Section' and 'NES Section' dropdowns. The 'HES Section' dropdown contains 'Adverse Effects Determination & MOA', 'Cultural Resources PA (CE & Minimum Criteria Projects)', 'Comprehensive Survey & Site Evaluation', and 'Data Recovery'. The 'NES Section' dropdown contains 'NRTR' and 'NRTR Review'. To the right of the dropdowns are three buttons: 'Close Request Types', 'Save All', and 'Submit All'. Below the buttons is a 'Common Documents' dropdown and a 'Requests' section. The 'Requests' section contains a list of request types: 'Historic Architecture - Adverse Effects Determination & MOA', 'Historic Architecture - Cultural Resources PA (CE & Minimum Criteria Projects)', 'Archaeology - Comprehensive Survey & Site Evaluation', 'Archaeology - Data Recovery', 'Environmental Coordination & Permitting - NRTR', and 'Environmental Coordination & Permitting - NRTR Review'. Arrows point from the 'Save All' button to the 'Requests' list.

The request type(s) you selected will appear in the left-hand selection panel and also in a list in the right-hand panel.

NOTE: if you change your mind about the group and/or section you have on the left-hand list, you can click the clear symbol (x) at any time before you submit the request.

NOTE: You may click “Save All” at any point so that you can leave & return later to finish your requests.

Screen Tip

A. If you want more space on the right-hand panel, you may select the Close Request Types button.

The screenshot displays the ETRACS web application interface. At the top, there is a dark blue header with the NCDOT logo and the text "Hello, aabarnestest". Below the header is a navigation bar with links for Dashboard, New Request, Reports, and About. The main content area is titled "Create Request". On the left, there are two sections for selecting groups and request types. The "HES Section" section includes buttons for "Historic Architecture", "Archaeology", and "Environmental Coordination & Permitting". The "NES Section" section includes buttons for "NRTR" and "NRTR Review". On the right, there are three green buttons: "Close Request Types" (highlighted with a yellow circle), "Save All", and "Submit All". Below these buttons is a "Common Documents" dropdown menu. The "Requests" section on the right lists several request types, each with a warning icon and a dropdown arrow: "Historic Architecture - Adverse Effects Determination & MOA", "Historic Architecture - Cultural Resources PA (CE & Minimum Criteria Projects)", "Archaeology - Comprehensive Survey & Site Evaluation", and "Archaeology - Data Recovery".

B. To open up the left panel back up again, simply select Add Request Type.

ETRACS Hello, aabarnestest

Dashboard New Request Reports About Settings Log Out

Create Request

+ Add Request Type Save All Submit All

Document to review *

<https://ncconnect.sharepoint.com/sites/pwa/PDEA%20Tracking%20Upgrade/Shared%20Documents/20150820%20-%20Meeting%20Minutes.doc?d=w96d63526c8ae4724bfe3c98ed9b94a90>

Requests

Historic Architecture - Adverse Effects Determination & MOA
Request saved successfully!

View on Map Submit this Request Save this Request

Request Details Milestones Documents

Usage Number	Description	Basic Date	Actual Completion Date
M0116	Cultural Resources MOA		

Historic Architecture - Environmental Document/Permit Application Review
Request saved successfully!

3.3 Create Request – Step 3 Create Request Details

17. On the right-hand panel, select the down arrow ▼ for the request you want to work on.

ETRACS Hello, aabarnestest

Dashboard New Request Reports About Settings Log Out

Create Request

Select one or more groups from HES and one group from NES.

Historic Architecture x Archaeology x
Environmental Coordination & Permitting x

Select your request types from the groups below.

HES Section

Adverse Effects Determination & MOA x
Cultural Resources PA (CE & Minimum Criteria Projects) x
Comprehensive Survey & Site Evaluation x
Data Recovery x

NES Section

NRTR x NRTR Review x

Close Request Types Save All Submit All

Common Documents

Requests

Historic Architecture - Adverse Effects Determination & MOA ▼

Historic Architecture - Cultural Resources PA (CE & Minimum Criteria Projects) ▼

Archaeology - Comprehensive Survey & Site Evaluation ▼

Archaeology - Data Recovery ▼

Environmental Coordination & Permitting - NRTR ▼

For each request, the Request Details open with 3 tabs for you to enter information as explained in the following sections:

3.3.1 REQUEST DETAILS TAB

3.3.2 MILESTONES TAB

3.3.3 DOCUMENTS TAB

3.3.1 Request Details Tab

18. Click on the Request Details Tab.

The screenshot displays the ETRACS web application interface. At the top, the NCDOT logo and 'ETRACS' text are visible, along with a user greeting 'Hello, aabarnestest'. The navigation bar includes links for Dashboard, New Request, Reports, and About, as well as Settings and Log Out options.

The main section is titled 'Create Request'. It contains several input fields and buttons:

- Select one or more groups from HES and one group from NES.** This section includes a dropdown menu with 'Historic Architecture', 'Archaeology', and 'Environmental Coordination & Permitting'.
- Select your request types from the groups below.** This section is divided into two parts:
 - HES Section:** Includes a dropdown menu with 'Adverse Effects Determination & MOA', 'Cultural Resources PA (CE & Minimum Criteria Projects)', 'Comprehensive Survey & Site Evaluation', and 'Data Recovery'.
 - NES Section:** Includes a dropdown menu with 'NRTR' and 'NRTR Review'.
- Buttons:** 'Close Request Types', 'Save All', and 'Submit All'.

Below the input fields, there is a 'Common Documents' section with a dropdown menu. The 'Requests' section shows a list of requests, with the first one being 'Historic Architecture - Adverse Effects Determination & MOA'. This request has three tabs: 'Request Details' (highlighted with a yellow circle), 'Milestones', and 'Documents'. The 'Request Details' tab is currently active, showing a 'Due Date' field with a placeholder 'mm/dd/yyyy' and a note 'Please allow 6 Months of lead time'.

19. Note the requested suggestion for lead time for this request

ETRACS Hello, aabarnestest

Dashboard New Request Reports About Settings Log Out

Create Request

Select one or more groups from HES and one group from NES.

Historic Architecture x Archaeology x
Environmental Coordination & Permitting x

Select your request types from the groups below.

HES Section

Adverse Effects Determination & MOA x
Cultural Resources PA (CE & Minimum Criteria Projects) x
Comprehensive Survey & Site Evaluation x
Data Recovery x

NES Section

NRTR x NRTR Review x

Close Request Types Save All Submit All

Common Documents

Requests

Historic Architecture - Adverse Effects Determination & MOA

View on Map Submit this Request Save this Request

Request Details Milestones Documents

Due Date *
mm/dd/yyyy

Please allow 6 Months of lead time

20. Enter a Due Date using the calendar.

ETRACS Hello, aabarnestest

Dashboard New Request Reports About Settings Log Out

Create Request

Select one or more groups from HES and one group from NES.

Historic Architecture x Archaeology x
Environmental Coordination & Permitting x

Select your request types from the groups below.

HES Section

Adverse Effects Determination & MOA x
Cultural Resources PA (CE & Minimum Criteria Projects) x
Comprehensive Survey & Site Evaluation x
Data Recovery x

NES Section

NRTR x NRTR Review x

Close Request Types Save All Submit All

Common Documents

Requests

Historic Architecture - Adverse Effects Determination & MOA

View on Map Submit this Request Save this Request

Request Details Milestones Documents

Due Date *

September 2015

Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

21. Add your notes in the large text box.

The screenshot displays the ETRACS web application interface. At the top, the NCDOT ETRACS logo is visible, along with a user greeting 'Hello, aabarnestest'. The navigation bar includes links for Dashboard, New Request, Reports, About, Settings, and Log Out.

The main section is titled 'Create Request'. It prompts the user to 'Select one or more groups from HES and one group from NES.' Below this, there are two sections for selecting request types:

- HES Section:** Includes tags for 'Historic Architecture', 'Archaeology', and 'Environmental Coordination & Permitting'.
- NES Section:** Includes tags for 'NRTR' and 'NRTR Review'.

Buttons for 'Close Request Types', 'Save All', and 'Submit All' are located at the top right of the form.

The 'Requests' section on the right shows a selected request: 'Historic Architecture - Adverse Effects Determination & MOA'. It includes options to 'View on Map', 'Submit this Request', and 'Save this Request'.

Under 'Request Details', there is a 'Due Date' field set to '06/30/2016'. Below this, a note states 'Please allow 3 months of lead time'. A large text box for adding notes is highlighted with a yellow oval. The text inside the box reads: 'Please note that dsklfj, dskjldsk, ljr djkl, fskjds, akjl, dfsa :dskjf, kfdjdkjfsa,. Project is adslfkj, dsaj, dskf dsjkl, dkjfskj, kjdsfa djsj, kfdskjldkjafds'.

3.3.2 Milestones Tab

22. Click on the Milestones Tab. The Milestones screen appears.

The screenshot shows the ETRACS web application interface. The top navigation bar includes the NCDOT logo, the text "Hello, aabarnestest", and links for Dashboard, New Request, Reports, About, Settings, and Log Out. The main content area is titled "Create Request" and contains two sections: "Select one or more groups from HES and one group from NES" and "Select your request types from the groups below". The "HES Section" includes tags for "Adverse Effects Determination & MOA", "Cultural Resources PA (CE & Minimum Criteria Projects)", and "Comprehensive Survey & Site Evaluation". The "NES Section" includes tags for "NRTR" and "NRTR Review". To the right, there are buttons for "Close Request Types", "Save All", and "Submit All". Below these is a "Common Documents" dropdown. The "Requests" section shows a list of requests, with the first one being "Historic Architecture - Adverse Effects Determination & MOA". This request has three tabs: "Request Details", "Milestones" (which is highlighted with a yellow circle), and "Documents". Below the tabs is a table with the following data:

Usage Number	Description	Basic Date	Actual Completion Date
M0116	Cultural Resources MOA		

23. Check the information that has come from STaRS/SAP. You may not update. Check the milestone list to ensure you are at the proper WBS level.

3.3.3 Documents Tab

24. Click on the Documents Tab. The Documents screen appears.

The screenshot displays the ETRACS web application interface. The top navigation bar includes the NCDOT logo, the text 'Hello, aabarnestest', and links for 'Dashboard', 'New Request', 'Reports', 'About', 'Settings', and 'Log Out'. The main content area is titled 'Create Request' and contains several sections for selecting request groups and types. The 'HES Section' includes options for 'Adverse Effects Determination & MOA', 'Cultural Resources PA (CE & Minimum Criteria Projects)', 'Comprehensive Survey & Site Evaluation', and 'Data Recovery'. The 'NES Section' includes 'NRTR' and 'NRTR Review'. On the right, the 'Requests' section shows a list of requests, with the 'Historic Architecture - Adverse Effects Determination & MOA' request selected. The 'Documents' tab is highlighted with a yellow circle. Below the tabs, the 'Documents' section contains a 'Vicinity Map' and several input fields for 'NCDOT Input Letters', 'Designated Lead Federal Agency', 'Preliminary Design', and 'Finding of Adverse Effects'. The 'Documents' tab is highlighted with a yellow circle.

This screen will have no pre-populated information and may be quite large.

NOTE: some documents are required and are marked with a red asterisk (*).

NOTE: each request type has its own unique set of required and optional documents.

25. Start with the Common Documents, which are those that are used for more than one request for this project's chosen WBS. Use the down arrow ▼ to open the Common Documents.

The screenshot shows the ETRACS 'Create Request' interface. At the top is a dark blue header with the NCDOT ETRACS logo on the left, navigation links (Dashboard, New Request, Reports, About) in the center, and user information (Hello, aabarnestest) and links (Settings, Log Out) on the right. Below the header is a 'Create Request' tab. The main content area is divided into two columns. The left column contains two sections: 'Select one or more groups from HES and one group from NES.' with a dropdown menu showing 'Historic Architecture', 'Archaeology', and 'Environmental Coordination & Permitting'; and 'Select your request types from the groups below.' with a section titled 'HES Section' containing three items: 'Adverse Effects Determination & MOA', 'Environmental Document/Permit Application Review', and 'Adverse Effects Determination & MOA'. The right column contains three buttons at the top: 'Close Request Types' (yellow), 'Save All' (green), and 'Submit All' (green). Below these is a dropdown menu labeled 'Common Documents' which is highlighted by a yellow oval. At the bottom right is a 'Requests' section with two items: 'Historic Architecture - Adverse Effects Determination & MOA' and 'Historic Architecture - Environmental Document/Permit Application Review', each with a dropdown arrow.

26. Using the location that is in the project's Project Store directory, enter the path to each common document in the unshaded fields. When you are adding a document path:

- Make sure you have run the .exe to map to map your Y: drive to Project Store
- Browse to the file using **Windows Internet Explorer**.
- Shift-Right-Click on the file.
- Select Copy as Path.
- Paste the path into the text box, removing the quotation marks around the link.

NOTE: You should always use **Windows Internet Explorer** to capture the document paths.

The screenshot shows the ETRACS 'Create Request' form. On the left, there are sections for selecting groups from HES and NES, and choosing request types. On the right, there is a 'Common Documents' section with a 'Document to review' text box. Two yellow ovals highlight the 'Document to review' text boxes. The top oval highlights a partially entered path: '%20Upgrade/Shared%20Documents/20150820%20-%20Meeting%20Minutes.doc?d=w96d63526c8ae4724bfe3c98ed9b94a90'. The bottom oval highlights a full URL: 'https://ncconnect.sharepoint.com/sites/pwa/PDEA%20Tracking%20Upgrade/Shared%20Documents/20150820%'. The interface includes a top navigation bar with 'Dashboard', 'New Request', 'Reports', and 'About', and a right-side user profile area showing 'Hello, aabarnestest' and 'Log Out'.

The path will also appear in the bottom shaded area on every request that uses the common document(s).

27. Using the same method described in the last step, enter the path to each document in the unshaded fields.

ETRACS Hello, aabarnestest

Dashboard New Request Reports About Settings Log Out

Create Request

Select one or more groups from HES and one group from NES.

Historic Architecture x Archaeology x
Environmental Coordination & Permitting x

Select your request types from the groups below.

HES Section

Adverse Effects Determination & MOA x
Cultural Resources PA (CE & Minimum Criteria Projects) x
Comprehensive Survey & Site Evaluation x
Data Recovery x

NES Section

NRTR x NRTR Review x

Requests

Historic Architecture - Adverse Effects Determination & MOA

View on Map Submit this Request Save this Request

Request Details Milestones Documents

Vicinity Map

NCDOT Input Letters *
<https://ncconnect.sharepoint.com/sites/pwa/PDEA%20Tracking%20Upgrade/Shared%20Documents/20150820%20PDEA%20Tracking%20Upgrade/20150820%20PDEA%20Tracking%20Upgrade/NCDOT%20Input%20Letters.pdf>

Designated Lead Federal Agency *
<https://ncconnect.sharepoint.com/sites/pwa/PDEA%20Tracking%20Upgrade/Shared%20Documents/20150820%20PDEA%20Tracking%20Upgrade/20150820%20PDEA%20Tracking%20Upgrade/Designated%20Lead%20Federal%20Agency.pdf>

Preliminary Design *
<https://ncconnect.sharepoint.com/sites/pwa/PDEA%20Tracking%20Upgrade/Shared%20Documents/20150820%20PDEA%20Tracking%20Upgrade/20150820%20PDEA%20Tracking%20Upgrade/Preliminary%20Design.pdf>

Finding of Adverse Effects

Comments on Finding

28. Save each request as you complete it. You will see a message **Request saved successfully!**

The screenshot displays the ETRACS web application interface. The top navigation bar includes the NCDOT logo, the text 'Hello, aabarnestest', and links for Dashboard, New Request, Reports, About, Settings, and Log Out. The main content area is titled 'Create Request' and features a sidebar with selection options for HES and NES groups, and request types. The main panel shows a list of requests, with the first request, 'Historic Architecture - Adverse Effects Determination & MOA', highlighted. A yellow circle highlights the 'Save this Request' button in the top right corner of the request details panel.

Create Request

Select one or more groups from HES and one group from NES.

Historic Architecture x Archaeology x
Environmental Coordination & Permitting x

Select your request types from the groups below.

HES Section

Adverse Effects Determination & MOA x
Cultural Resources PA (CE & Minimum Criteria Projects) x
Comprehensive Survey & Site Evaluation x
Data Recovery x

NES Section

NRTR x NRTR Review x

Requests

Historic Architecture - Adverse Effects Determination & MOA

View on Map Submit this Request **Save this Request**

Request Details Milestones Documents

Vicinity Map

NCDOT Input Letters *

https://ncconnect.sharepoint.com/sites/pwa/PDEA%20Tracking%20Upgrade/Shared%20Documents/20150820%2

Designated Lead Federal Agency *

https://ncconnect.sharepoint.com/sites/pwa/PDEA%20Tracking%20Upgrade/Shared%20Documents/20150820%2

Preliminary Design *

https://ncconnect.sharepoint.com/sites/pwa/PDEA%20Tracking%20Upgrade/Shared%20Documents/20150820%2

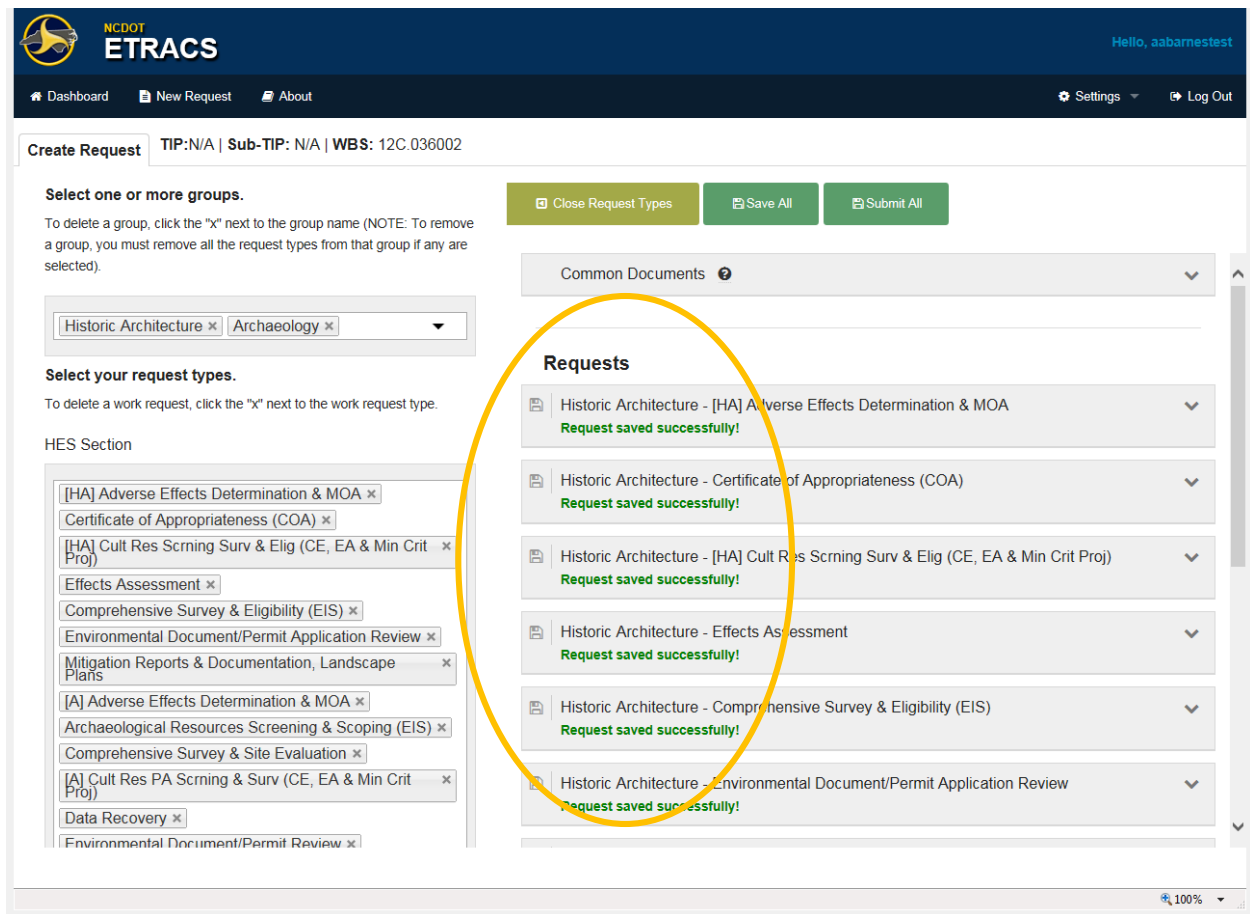
Finding of Adverse Effects

Comments on Finding

29. Close the completed request with the up arrow ▲.

30. For each request, return to Section 3.3 Create Request – Step 3 Create Request Details and repeat the steps for each request.

When you have completed and saved all the requests for this project, your screen will show the **Request saved successfully!** message for each request. There is also now a “save” icon in the form of a floppy disk.



ETRACS Hello, aabarnestest

Dashboard New Request About Settings Log Out

Create Request TIP: N/A | Sub-TIP: N/A | WBS: 12C.036002

Select one or more groups.
To delete a group, click the "x" next to the group name (NOTE: To remove a group, you must remove all the request types from that group if any are selected).

Historic Architecture x Archaeology x

Select your request types.
To delete a work request, click the "x" next to the work request type.

HES Section

- [HA] Adverse Effects Determination & MOA x
- Certificate of Appropriateness (COA) x
- [HA] Cult Res Scrmg Surv & Elig (CE, EA & Min Crit Proj) x
- Effects Assessment x
- Comprehensive Survey & Eligibility (EIS) x
- Environmental Document/Permit Application Review x
- Mitigation Reports & Documentation, Landscape Plans x
- [A] Adverse Effects Determination & MOA x
- Archaeological Resources Screening & Scoping (EIS) x
- Comprehensive Survey & Site Evaluation x
- [A] Cult Res PA Scrmg & Surv (CE, EA & Min Crit Proj) x
- Data Recovery x
- Environmental Document/Permit Review x

Requests

- Historic Architecture - [HA] Adverse Effects Determination & MOA
Request saved successfully!
- Historic Architecture - Certificate of Appropriateness (COA)
Request saved successfully!
- Historic Architecture - [HA] Cult Res Scrmg Surv & Elig (CE, EA & Min Crit Proj)
Request saved successfully!
- Historic Architecture - Effects Assessment
Request saved successfully!
- Historic Architecture - Comprehensive Survey & Eligibility (EIS)
Request saved successfully!
- Historic Architecture - Environmental Document/Permit Application Review
Request saved successfully!

Screen Tip

These instructions suggest saving each request so that ETRACS can help you by verifying each request in turn. When you are more familiar with ETRACS and all the request types, you may choose

to complete all the request details without saving each request, but rather by saving them all when they are all complete. In this case, use the Save All button.

Screen Tip

As you work through creating and adding all the information to your requests, note that the TIP#, Sub-TIP# and WBS# are shown on the screen. This will prove helpful if you want to check to be sure you recall which project you are working with.

The screenshot shows the ETRACS 'Create Request' interface. At the top, a yellow circle highlights the header area with the text: 'Create Request TIP: N/A | Sub-TIP: N/A | WBS: 12C.036002'. Below this, there are buttons for 'Close Request Types', 'Save All', and 'Submit All'. The main section is titled 'Select one or more groups.' and includes a dropdown menu with 'Historic Architecture' and 'Archaeology' selected. Below this is a section for 'Select your request types.' with a list of request types, each with an 'x' button to remove it. The list includes: '[HA] Adverse Effects Determination & MOA', 'Certificate of Appropriateness (COA)', '[HA] Cult Res Scriming Surv & Elig (CE, EA & Min Crit Proj)', 'Effects Assessment', 'Comprehensive Survey & Eligibility (EIS)', 'Environmental Document/Permit Application Review', 'Mitigation Reports & Documentation, Landscape Plans', '[A] Adverse Effects Determination & MOA', 'Archaeological Resources Screening & Scoping (EIS)', 'Comprehensive Survey & Site Evaluation', '[A] Cult Res PA Scriming & Surv (CE, EA & Min Crit Proj)', 'Data Recovery', and 'Environmental Document/Permit Review'. On the right side, there is a 'Requests' section with a list of requests, each with a dropdown arrow and a 'Request saved successfully!' message. The requests listed are: 'Historic Architecture - [HA] Adverse Effects Determination & MOA', 'Historic Architecture - Certificate of Appropriateness (COA)', 'Historic Architecture - [HA] Cult Res Scriming Surv & Elig (CE, EA & Min Crit Proj)', 'Historic Architecture - Effects Assessment', 'Historic Architecture - Comprehensive Survey & Eligibility (EIS)', and 'Historic Architecture - Environmental Document/Permit Application Review'. The bottom of the screen shows a zoom level of 100%.

NOTE: you can also save your work at any time in the process of creating the request. However, you will not be able to submit them (next step) until all the information and required documents are included.

ETRACS Hello, aabarnestest

Dashboard New Request About Settings Log Out

Create Request TIP: N/A | Sub-TIP: N/A | WBS: 12C.036002

Select one or more groups.
To delete a group, click the "x" next to the group name (NOTE: To remove a group, you must remove all the request types from that group if any are selected).

Historic Architecture x Archaeology x

Select your request types.
To delete a work request, click the "x" next to the work request type.

HES Section

- [HA] Adverse Effects Determination & MOA x
- Certificate of Appropriateness (COA) x
- [HA] Cult Res Scrmng Surv & Elig (CE, EA & Min Crit Proj) x
- Effects Assessment x
- Comprehensive Survey & Eligibility (EIS) x
- Environmental Document/Permit Application Review x
- Mitigation Reports & Documentation, Landscape Plans x
- [A] Adverse Effects Determination & MOA x
- Archaeological Resources Screening & Scoping (EIS) x
- Comprehensive Survey & Site Evaluation x
- [A] Cult Res PA Scrmng & Surv (CE, EA & Min Crit Proj) x
- Data Recovery x
- Environmental Document/Permit Review x

Close Request Types Save All Submit All

Common Documents

Requests

- Historic Architecture - [HA] Adverse Effects Determination & MOA
Request saved successfully!
- Historic Architecture - Certificate of Appropriateness (COA)
Request saved successfully!
- Historic Architecture - [HA] Cult Res Scrmng Surv & Elig (CE, EA & Min Crit Proj)
Request saved successfully!
- Historic Architecture - Effects Assessment
Request saved successfully!
- Historic Architecture - Comprehensive Survey & Eligibility (EIS)
Request saved successfully!
- Historic Architecture - Environmental Document/Permit Application Review
Request saved successfully!

100%

When your requests have been successfully saved, they are in the ETRACS system and will show on your dashboard as IN DRAFT.

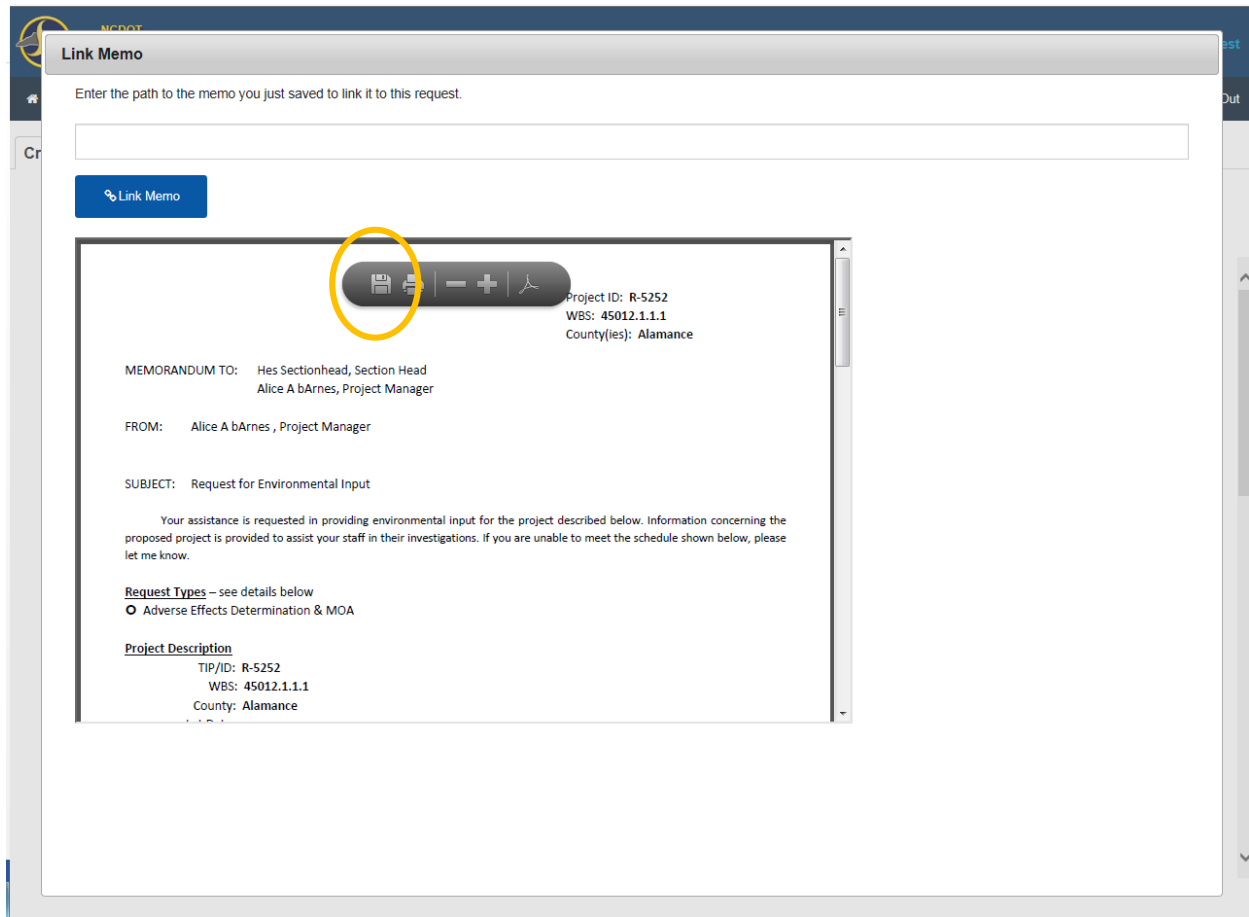
3.4 Create Request – Step 4 Submit the Request

31. Click on the Submit All button. NOTE: if you are creating a single request, just use the Submit button on the request screen.

The Request now moves to Requested status. You will be taken to the Link Memo screen.

3.4.1 Generate Memo and Notifications

32. First save the memo using the Save icon. Save the memo to Project Store. **NOTE:** If you do not have access to Project Store, follow your normal procedure for submitting documents to PDEA.



Link Memo

Enter the path to the memo you just saved to link it to this request.

[Link Memo](#)

Project ID: R-5252
WBS: 45012.1.1.1
County(ies): Alamance

MEMORANDUM TO: Hes Sectionhead, Section Head
Alice A bArnes, Project Manager

FROM: Alice A bArnes, Project Manager

SUBJECT: Request for Environmental Input

Your assistance is requested in providing environmental input for the project described below. Information concerning the proposed project is provided to assist your staff in their investigations. If you are unable to meet the schedule shown below, please let me know.

Request Types – see details below
☐ Adverse Effects Determination & MOA

Project Description
TIP/ID: R-5252
WBS: 45012.1.1.1
County: Alamance

33. Navigate to the place where you saved the memo, retrieve the path (just as you did for the documents), and enter the path to link the memo to the notification.

Link Memo

Enter the path to the memo you just saved to link it to this request.

<https://ncconnect.sharepoint.com/sites/pwa/PDEA%20Tracking%20Upgrade/Shared%20Documents/TEST%20RequestMemo.pdf>

Link Memo

Project ID: R-5252
WBS: 45012.1.1.1
County(ies): Alamance

MEMORANDUM TO: Hes Sectionhead, Section Head
Alice A bArnes, Project Manager

FROM: Alice A bArnes, Project Manager

SUBJECT: Request for Environmental Input

Your assistance is requested in providing environmental input for the project described below. Information concerning the proposed project is provided to assist your staff in their investigations. If you are unable to meet the schedule shown below, please let me know.

Request Types – see details below
☒ Adverse Effects Determination & MOA

Project Description
TIP/ID: R-5252
WBS: 45012.1.1.1
County: Alamance

34. Preview the notifications:

- For your convenience, a copy of this memo will be sent to your Outlook email. You may forward the email, along with any extra documents you have attached, to anyone in DOT's email system, as well as from your personal Outlook contact list.
- (Optional) Include your own message along with the system-generated information.
- (Optional) Attach links to any additional documents. NOTE: be aware that files linked in this memo are not stored in ETRACS.
- Scroll down to see that ETRACS has included the information about the projects, as well as for all of the requests you just created.

Request Notification

Send request notifications

Your Request will be sent to the following people with the attached memo you linked:

Alice Barnes, Engineering Manager two

For your convenience, a copy of this memo will be sent to your Outlook email. You may forward the email, along with any extra documents you have attached, to anyone in DOT's email system, as well as from your personal Outlook contact list.

Enter the subject line of the email address
This is a message to notify you that a request has been made.

You can also enter your own message which will be included in the notification.

Attach any additional documents you would like here.
Attached files are not stored in the ETRACS system.

Send Notification **Cancel**

Notification preview:

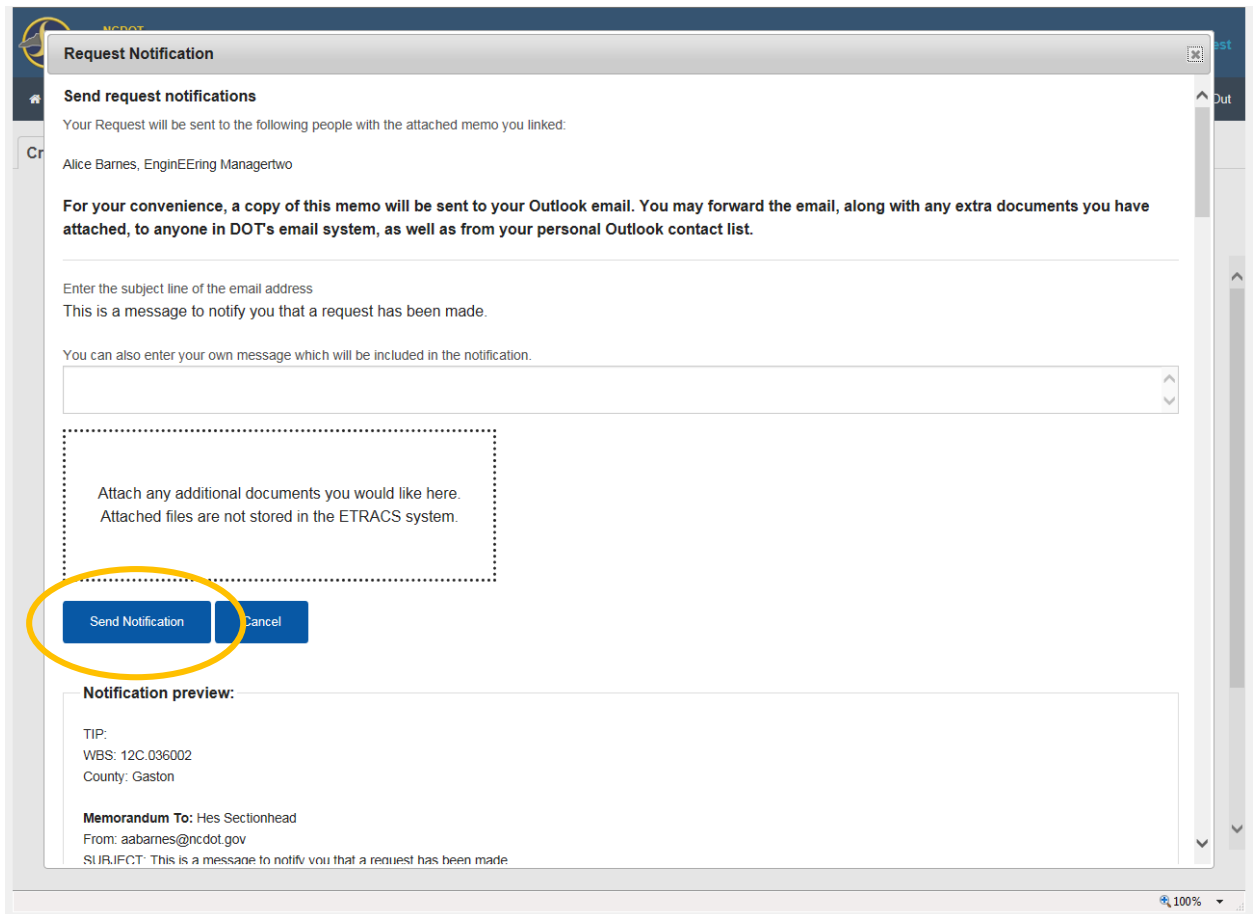
TIP:
WBS: 12C.036002
County: Gaston

Memorandum To: Hes Sectionhead
From: aabarnes@ncdot.gov
SUBJECT: This is a message to notify you that a request has been made.

35. If you see problems with any of the requests, press Cancel. You will be returned to the Create Request screen. You can edit the request details or delete work request(s) if you need to. To delete a request, use the X button located in the left panel. You will be prompted to be sure you want to delete it.

The screenshot shows the ETRACS 'Create Request' interface. At the top, there's a header with the NCDOT logo and 'ETRACS' text. Below the header, there are navigation links: Dashboard, New Request, and About. On the right, there are links for Settings and Log Out. The main content area is titled 'Create Request' and includes a sub-header with 'TIP: N/A | Sub-TIP: N/A | WBS: 12C.036002'. Below this, there are three buttons: 'Close Request Types', 'Save All', and 'Submit All'. The 'Select one or more groups.' section shows a list of groups: 'Historic Architecture' and 'Archaeology'. The 'Select your request types.' section shows a list of request types under the 'HES Section' category. A yellow arrow points to the 'X' button next to the '[HA] Cult Res Scrmg Surv & Elig (CE, EA & Min Crit Proj)' request type. A modal dialog titled 'Delete Work Request ?' is open, asking 'This will delete this work request. Are you sure you want to do this?' with 'Ok' and 'Cancel' buttons.

36. When you are satisfied with the information in the notification, click the Send Notification button.



Request Notification

Send request notifications

Your Request will be sent to the following people with the attached memo you linked:

Alice Barnes, EnginEERING Managertwo

For your convenience, a copy of this memo will be sent to your Outlook email. You may forward the email, along with any extra documents you have attached, to anyone in DOT's email system, as well as from your personal Outlook contact list.

Enter the subject line of the email address
This is a message to notify you that a request has been made.

You can also enter your own message which will be included in the notification.

Attach any additional documents you would like here.
Attached files are not stored in the ETRACS system.

Send Notification **Cancel**

Notification preview:

TIP:
WBS: 12C.036002
County: Gaston

Memorandum To: Hes Sectionhead
From: aabarnes@ncdot.gov
SUBJECT: This is a message to notify you that a request has been made.

You will receive a message that your request has been submitted successfully. ETRACS sends the request notification to the appropriate Outlook inboxes: the section Supervisor/Group Leader, the requestor, and any additional people whom you selected.

ETRACS now takes you back to the Create Request screen. All of your requests will carry the message **Request submitted successfully!** There is also an icon (checkmark) to indicate success.

The screenshot shows the ETRACS web application interface. The browser address bar displays <https://apps.ncdot.gov/PDEA/etracs/HES/Project/ValidateProjectInfo>. The page title is "ETRACS". The user is logged in as "Hello, aabarnestest". The navigation bar includes "Dashboard", "New Request", "About", "Settings", and "Log Out".

The main content area is titled "Create Request" with a breadcrumb trail: "TIP: I-5110 | Sub-TIP: I-5110 | WBS: 42345.3".

Select one or more groups.
To delete a group, click the "x" next to the group name (NOTE: To remove a group, you must remove all the request types from that group if any are selected).

Selected groups: Historic Architecture x, Archaeology x.

Select your request types.
To delete a work request, click the "x" next to the work request type.

HES Section

Selected request types: Certificate of Appropriateness (COA) x, Effects Assessment x, [A] Cult Res PA Scrmg & Surv (CE, EA & Min Crit Proj) x, [A] Adverse Effects Determination & MOA x.

Buttons: Close Request Types, Save All, Submit All.

Common Documents

Requests

Request Type	Status
Historic Architecture - Certificate of Appropriateness (COA)	Request submitted successfully!
Historic Architecture - Effects Assessment	Request submitted successfully!
Archaeology - [A] Cult Res PA Scrmg & Surv (CE, EA & Min Crit Proj)	Request submitted successfully!
Archaeology - [A] Adverse Effects Determination & MOA	Request submitted successfully!

37. Return to the Dashboard.

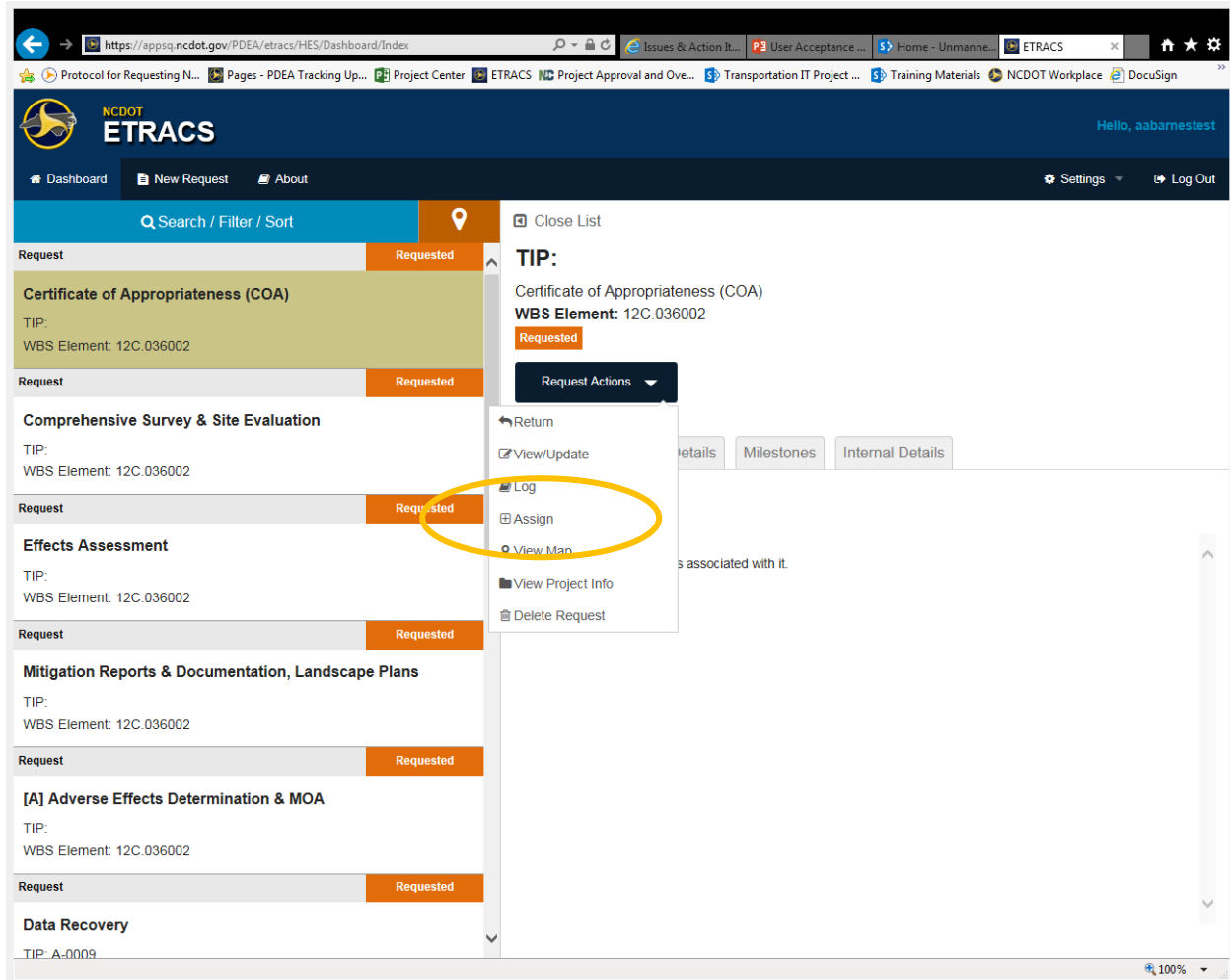
On the Dashboard, they will all have the status "Requested."

The screenshot displays the NCDOT ETRACS web application. The top navigation bar includes the NCDOT logo, the text "ETRACS", and a user greeting "Hello, aabarnestest". Below this, a secondary navigation bar contains links for "Dashboard", "New Request", and "About", along with "Settings" and "Log Out" options. A search bar with the placeholder "Search / Filter / Sort" is positioned on the left. The main content area is divided into two columns. The left column lists several requests, each with a title, a "TIP:" label, a "WBS Element" (12C.036002), and a "Requested" status. The right column provides a detailed view of the selected "Certificate of Appropriateness (COA)" request, including a "TIP:" section, a "WBS Element" (12C.036002), a "Requested" status, and a "Request Actions" dropdown menu. Below this, there are tabs for "Overview", "Request Details", "Milestones", and "Internal Details". The "Overview" tab is active, showing a "Subtasks" section with the message "This request has no subtasks associated with it."

4 Assign Request – For the Supervisor

Now that the request has been created and requested, the supervisor can assign each one appropriately to a specialist to do the work.

1. From the Dashboard, highlight the request on the left-hand panel, click on the Request Actions button, and select Assign.



A blank Assign Request screen appears.

The screenshot shows the 'Assign Request' form with the following sections:

- Assign To:** A dropdown menu with the text 'Select the person to assign this request to:' and a 'Select' button.
- Internal Due Date:** A text input field with the label 'Internal Due Date'.
- Deliverables:** A list of checkboxes with the following options:
 - ☐ GIS files
 - ☐ Curated Artifacts
 - ☐ PA Forms No Survey Required
 - ☐ PA Forms Survey Required
 - ☐ PA Forms No Historic Properties Present or Affected
 - ☐ Site Forms
- Add Additional Deliverables:** A text input field with a '+' icon and the text 'Add Additional Deliverables'.
- Buttons:** 'Assign Request' and 'Cancel' buttons at the bottom.

2. Select the person you wish to assign the request to.

NOTE: you may also assign a request to yourself if you are in the appropriate user group.

3. Select the Internal Due Date either typing the date or using the calendar. You can use the Internal Due Date to give everyone a buffer of time for internal review before the request due date.
4. Review the deliverables that may already be defined. Add the path to any additional deliverables that are needed.
5. Use the large text box for internal notes that are going to the assignee.
6. When you are satisfied with the information, click the Assign Request button.

Assign Request

Assign To
Select the person to assign this request to:
A bArnes,Alice

Internal Due Date
Internal Due Date
09/25/2015

Deliverables
No predefined deliverable exists.

Add Additional Deliverables

+ Add Additional Deliverables

Internal Notes
Internal Notes
This is a note just to you.

Assign Request Cancel

WBS Element: 32572.1.1

You will receive a message that you have **successfully assigned the request**. The request is now shown on the Dashboard as In Progress.

5 Review Request – For the Specialist

Once the request is assigned, as in Section 4 Assign Request, the specialist who has been assigned will see it in their dashboard with the status In Progress. If you are assigned a request:

ETRACS Hello, aabarnestest

Dashboard New Request Reports About Settings Log Out

Search / Filter / Sort Close List

404 Mailing List
TIP: A-0009
WBS Element: 32572.1.1
Request Requested

404 Mailing List
TIP: A-0009
WBS Element: 32572.1.1
Request In Progress

PDEA Consultant Workday Estimate
TIP: A-0009
WBS Element: 32572.1.1
Request Waiting HPO

Mitigation Reports & Documentation, Landscape Plans
TIP: R-5252

TIP: A-0009
PDEA Consultant Workday Estimate
WBS Element: 32572.1.1
In Progress
Request Actions

Overview Request Details Milestones Internal Details

Subtasks
This request has no subtasks associated with it.

1. Highlight the request on the left-hand panel. Review the request tabs: Overview, Request Details, Milestones, and Internal Details.
2. Take note of the dates and other information on the Request Details tab.

ETRACS Hello, aabarnestest

Dashboard New Request Reports About Settings Log Out

Search / Filter / Sort Close List

TIP: A-0009
PDEA Consultant Workday Estimate
WBS Element: 32572.1.1
In Progress
Request Actions

Overview **Request Details** Milestones Internal Details

On Behalf Of Submitted to

Original Due Date: 9/17/2015 **Assigned to:** AliceA bArnes

Proposed Revised Due Date: **Revised Due Date:** Please allow a lead time of 2 Weeks

Actual Completion Date:

Deliverables

Common Documents
These documents are used by more than one request for this project.
[Project Initiation Meeting Minutes](#)

Documents
[Aerial photos w/ Study Area](#)

Additional Messages

3. After reviewing the Request Details:

- If everything is in order, you will start working on the request. Continue with Section 5.1 Accept Request.
- If there is some problem with the request, you will need to return it to the requestor. Continue with Section 5.2 Return Request.

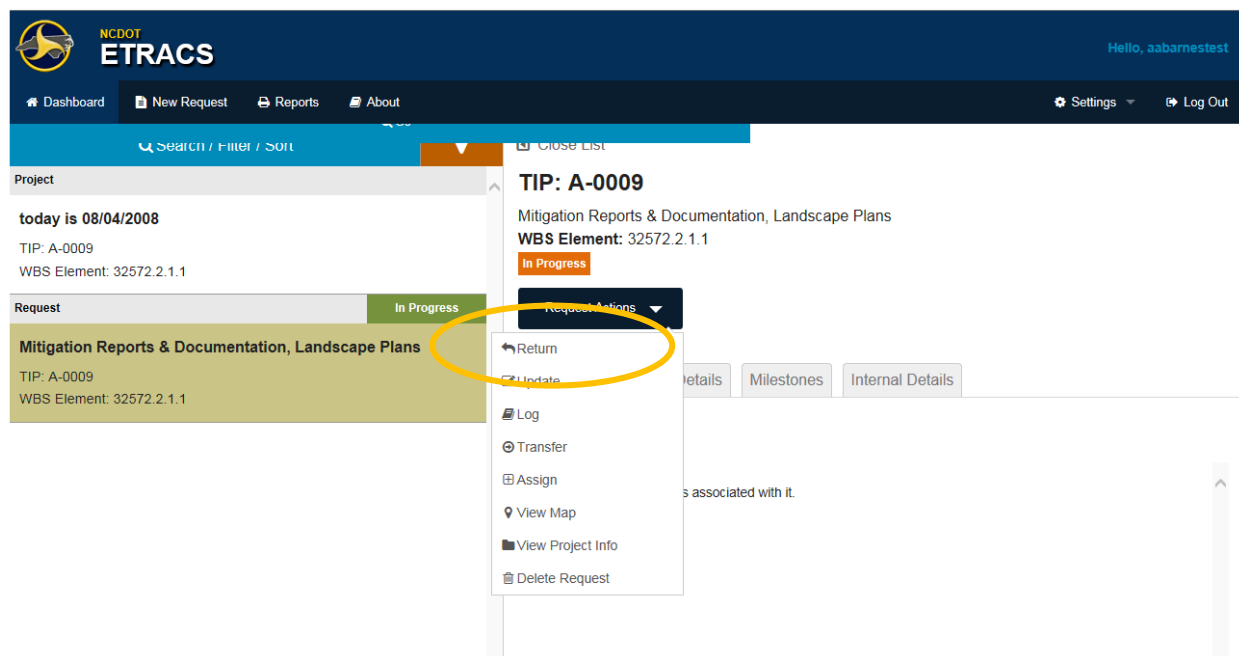
5.1 Accept Request – For the Specialist

UNDER CONSTRUCTION

5.2 Return Request – For the Specialist and the Supervisor

If the specialist who has received the assignment is not able to perform this request for some reason, or is not able to meet the date requested, the assignee would return the request to the supervisor.

1. Highlight the request on the left-hand panel, click on the Request Actions button, and select Return.



The Return Request window appears.

2. Fill out the appropriate information: the requestor to Return to, the Reason for Return, the radio button to indicate whether you want to propose a new date, and the date (if you are proposing a new date).

The screenshot displays the ETRACS web application interface. On the left, a sidebar lists various request categories: Data Recovery, Adverse Effects Determination, Cultural Resources PA (CE & Mi), Benthic survey, and General Mailing List. Each category shows a TIP number (A-0009) and a WBS Element (32572.1.1). The main content area shows a list of requests, with one request highlighted in orange and labeled 'In Progress'. A modal window titled 'Return Request' is open, allowing a user to return a request. The modal contains the following fields and controls:

- Return to:** A dropdown menu with 'A bArnes, Alice' selected.
- Reason for Return:** A text area containing the text 'I simply cannot meet this date. I have things to do.'
- I would like to propose a new date:** Radio buttons for 'Yes' (selected) and 'No'.
- New date:** A text input field containing '05/05/2016'.
- Buttons:** A blue button labeled 'Return Request' and a white button labeled 'Cancel'.

The 'Return Request' button is circled in yellow, indicating it is the next step in the process.

3. Click the Return Request button.

You will receive a message that you have **successfully returned the request**.

The request returns to the supervisor's dashboard with the status Returned. See Section 5.3 Actions for Returned Requests.

The screenshot shows the ETRACS dashboard interface. On the left, a list of requests is displayed. The 'General Mailing List' request is highlighted with a yellow circle, and its status is 'Returned'. The right panel shows the details for this request, including the title 'General Mailing List', TIP: A-0009, and WBS Element: 32572.1.1. The status 'Returned' is also displayed in a red box. Below the details, there are tabs for 'Overview', 'Request Details', 'Milestones', and 'Internal Details'. The 'Overview' tab is selected, showing a 'Subtasks' section with the message 'This request has no subtasks associated with it.'

5.3 Actions for Returned Requests – For the Supervisor

When a request has been returned, the supervisor may take a number of different actions, depending upon the reason for the return. See the following sections:

5.3.1 REASSIGN THE REQUEST

5.3.2 NEGOTIATE / CHANGE THE DUE DATE

5.3.3 DELETE A REQUEST

5.3.1 Reassign the Request

To reassign the request to someone else, use the same process in Section 4 Assign Request.

5.3.2 Negotiate / Change the Due Date or other Information – For the Supervisor and Specialist

1. With the request highlighted on the left-hand screen, review the proposed new date, any additional information added, and the message that was included in the return.

The screenshot displays the ETRACS web application interface. On the left, a list of requests is shown, including 'Adverse Effects Determination & MOA', 'Cultural Resources PA (CE & Minimum Criteria Projects)', 'Benthic survey', 'General Mailing List', 'Land Use Scenario Assessment (LUSA)', and 'PDEA Consultant Report Review'. The 'General Mailing List' request (TIP: A-0009, WBS Element: 32572.1.1) is highlighted in green and marked as 'Returned'.

The right pane shows the details for 'TIP: A-0009', 'General Mailing List', with WBS Element: 32572.1.1. The status is 'Returned'. The 'Request Actions' dropdown is visible. The 'Request Details' tab is active, showing the 'Original Due Date' as 9/26/2015 and the 'Proposed Revised Due Date' as 5/5/2016. The 'Assigned to' field shows 'Alice A bArnes'. The 'Revised Due Date' field shows 'Please allow a lead time of 15 Days'. The 'Actual Completion Date' field is empty. Below these fields are sections for 'Deliverables', 'Common Documents', and 'Documents'. The 'Additional Messages' section shows a message from 'Alice A bArnes on 9/23/2015 4:51:33 PM' with the text 'adsfdfsfa'.

2. Use the View/Update functionality to review and change the information.

The screenshot displays the NCDOT ETRACS web application. The top navigation bar includes the NCDOT logo, the text "NCDOT ETRACS", and a user greeting "Hello, aabarnestest". Below this, there are links for "Dashboard", "New Request", and "About". A search bar with the text "Search / Filter / Sort" is also present. The main content area is divided into two sections. On the left, a list of requests is shown, each with a status label (e.g., "Requested", "In Progress", "Assigned"). The "Effects Assessment" request is highlighted. On the right, a detailed view of the "Effects Assessment" request is shown, including the TIP number (I-5110), WBS Element (42345.3), and a "Request Actions" dropdown menu. The "View/Update" option in the dropdown menu is circled in yellow. Other details visible include "Submitted to: EnginEeringManagertwo", "Assigned to: Unassigned", "Revised Due Date: 12/16/2015", and "Please allow a lead time of 6 Months".

5.3.3 Delete a Request – For the Supervisor and Requestor

3. To delete a request, use the Delete Request under Request Actions.

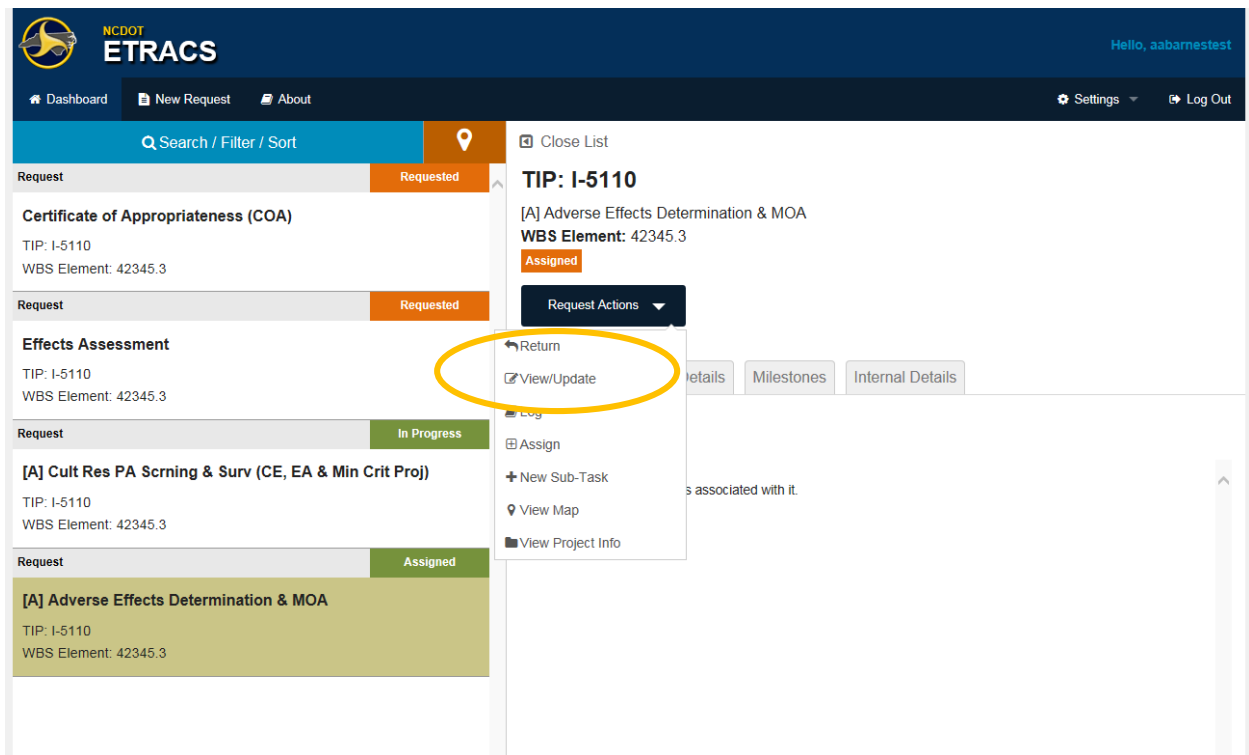
The system will prompt you:

4. You can confirm or cancel.

5.3.4 Update / Complete Request – For Specialists

Steps for completing the request.

5. Select the View/Update function from the Request Actions to access the Internal Details screen. There you may enter and view the request results, completed deliverables, etc.



This Internal Details screen has been developed just for your groups to contain the things that you need. Wherever there is an Internal Details tab, it will contain the information that needs to be tracked uniquely for that request type.

6. On the View/Update screen you may view or enter all of the information for the request (depending upon your role). These screens may be quite large, so use the scroll bars and the expansion arrows to navigate.

View/Update Request

TIP: I-5110 | Sub-TIP: I-5110 | WBS: 42345.3

Request Details | Milestones | **Internal Details**

Internal Due Date

Internal Due Date

Archaeology ^

1. Screening

Name of Archaeologist

☐ No survey Date

☐ Survey Required Date

2. Survey v

3. Eligibility v

Save **Cancel**

7. When the work on the request has been completed, Use the Status field on the Request Details to mark it completed.

View/Update Request

TIP: I-5110 | Sub-TIP: I-5110 | WBS: 42345.3

Request Details | Milestones | Internal Details

Status

Completed

Request details

Requested by:
Alice Barnes on 12/4/2015

Submitted to:
AliceBarnes

Proposed Revised Due Date:
Original Due Date: *
12/31/2015

Assigned to:
HesSpecialist

Actual Completion Date:

Revised Due Date:

Please allow a lead time of 6 Months

Deliverables

5.4 Return an Incomplete or Unacceptable Request – For Requestor or Supervisor

In addition to the purposes outlined in Section 5.2 “Return Request,” there may be instances where a specialist (an internal employee or external consultant) incorrectly marks a Request as Completed. For example, when it comes back to the reviewer / requestor, the work may be deemed incomplete, the deliverable unacceptable, or any other reason that it should not be marked complete. In that case, the requestor or the supervisor should use the Return Request function – along with filling in the Reason for Return box – to return it to the specialist.

5.5 Update Project

NOTE: UNDER CONSTRUCTION

5.6 Put Project on Hold

NOTE: UNDER CONSTRUCTION for a future release

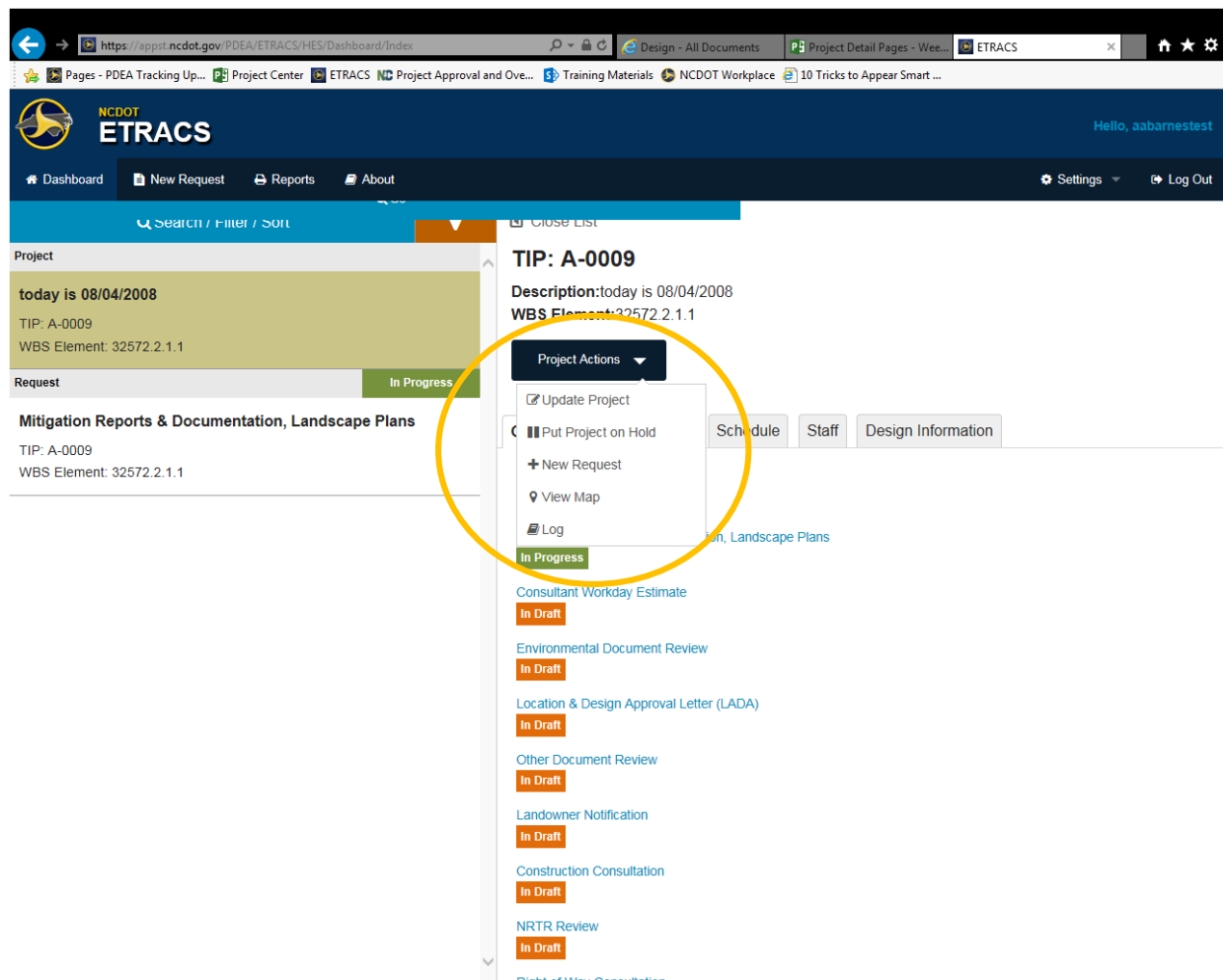
5.7 Log

5.8 Create and Update Sub Task

5.9 Assigning Requests and Subtasks to a Consultant

6 Project Functions

NOTE: project functions are under development. Several groups – before they are implemented for making requests – will need the functionality to be defined in the ECAP FDD (Increment 12). See schedule/project plan for timing of these implementations.



7 Reference

7.1.1 Request Status Values

Request Status Name	Active/Inactive	Status Description
Requested	Active	Requestor submits new request for NES and HES Can be deleted by Requestor. Can be updated by Requestor.

Request Status Name	Active/ Inactive	Status Description
In Draft	Inactive	Requestor saves the request that is not yet submitted Can be deleted by Requestor. Can be updated by Requestor.
In QC	Inactive	PPE Consultant submits the request to PPE for review and approval. Can be deleted by Requestor. Can be updated by Requestor.
Returned	Active	PPE returns the request submitted by PPE Consultant for review. Assigned To can Return to Requestor. Requestor Returns in Updated status to Assigned To Can be deleted by Requestor. Can be updated by Requestor.
Assigned	Active	NES/HES Supervisor assigns the request to the NES/HES Specialist (or themselves). Cannot be deleted. Can be updated by Submitted To user.
In Progress	Active	NES/HES Specialist begins work on the request Cannot be deleted. Can be updated by Submitted To and Assigned To users.
Pending Review	Active	Requested document for the request is pending a review. Cannot be deleted. Can be updated by Submitted To and Assigned To users.
Waiting HPO	Active	Cannot be deleted. Can be updated by Submitted To and Assigned To users.
On field	Active	NES/HES specialist indicates the field visit and provides the field visit dates Cannot be deleted. Can be updated by Submitted To and Assigned To users.
Completed	Inactive	NES/HES specialist completes the work or task for the request Cannot be deleted. Can be updated by Submitted To and Assigned To users.
Canceled	Inactive	Cannot be deleted. Can be updated by Submitted To and Assigned To users.

7.1.2 Request Functions

The screenshot displays the ETRACS web application interface. The top navigation bar includes the NCDOT logo, the text "ETRACS", and a user greeting "Hello, aabarnestest". Below this, a secondary navigation bar contains links for "Dashboard", "New Request", "Reports", and "About", along with "Settings" and "Log Out" options.

The main content area is divided into two sections. On the left, a list of requests is shown, each with a title, TIP number, WBS Element, and a status button. The requests are:

- 404 Mailing List**: TIP: A-0009, WBS Element: 32572.1.1, status **Requested**.
- General Mailing List**: TIP: A-0009, WBS Element: 32572.1.1, status **Returned**.
- Environmental Document/Permit Review**: TIP: A-0009, WBS Element: 32572.1.1, status **In Draft**.
- New location/widening projects: Design plans for inclusion in permit package**: TIP: A-0009, WBS Element: 32572.1.1, status **Requested**.
- General Mailing List**: TIP: A-0009, status **Requested**.

On the right, a detailed view of the selected request "TIP: A-0009" is shown. It includes the title "Environmental Document/Permit Review", the WBS Element "32572.1.1", and a status button **Returned**. Below this, a "Request Actions" dropdown menu is open, showing options: "Return", "Update", "Log", "Transfer", "Assign", "New Sub-Task", "View Map", "View Project Info", and "Delete Request".